OrgPublisher 9 Deployment Guide

VERSION 9

aquire OrgPublisher

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Deployment Guide Introduction

The *OrgPublisher 9 Deployment Guide* is a combined package of several PDF documents that can be used individually or as a package to install and implement OrgPublisher.

To return to this page after accessing another PDF, click

This PDF package includes the:

- **OrgPublisher 9 Architecture Overview**
  This document explains how the architecture components work together to create and publish your chart. The document also includes the graphic topology of the OrgPublisher publishing formats.
- **OrgPublisher 9 Installation Guide**
  This document provides instructions to install OrgPublisher, including setting up Web Administration.
- **OrgPublisher 9 PluginX Implementation Guide**
  This document provides detailed information about installing and distributing PluginX.
- **OrgPublisher 9 Real-time Implementation Guide**
  This document contains the overview and setup steps for real-time publishing.
- **OrgPublisher 9 EChart and PluginX Security Guide**
  This document explains the security features for both published PluginX charts and ECharts.
- **OrgPublisher 9 EChart Server Setup Guide**
  This document provides instructions to set up the server in order to produce and publish an EChart.
- **OrgPublisher 9 Thin Client Implementation Guide**
  This document provides important considerations and configuration changes when publishing as an EChart thin client.
- **OrgPublisher 9 Upgrade Considerations**
  This document provides instructions on upgrading your OrgPublisher application to the current version.

You can view each individual PDF by using the **Bookmark** feature in the sidebar to the left.

You can also view **Thumbnails** of each page by clicking the button in the sidebar to the left.

OrgPublisher 9 Architecture Overview

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OrgPublisher Introduction

This document provides a high level overview of OrgPublisher and information related to installing the application. It includes deployment requirements and, in addition, it provides links to information you may need for a successful install.

OrgPublisher™ automatically builds organizational charts from information stored in your company HR system.

It charts hierarchical data (such as person-to-person, position-to-position and department-to-department relationships) from your existing HR system, and automatically creates an org chart based on the hierarchy extracted.

The infrastructure and systems requirements OrgPublisher are usually readily available within most organizations.

OrgPublisher connects to an ODBC compliant data source and allows for import of a variety of data sources.

OrgPublisher is available in:

- OrgPublisher 9
- OrgPublisher Premier (includes OrgSuccession™ Features)
- OrgPublisher for SAP® solutions
- OrgPublisher for Oracle® HRMS
- OrgPublisher for PeopleSoft® HCM

After installation, your OrgPublisher administrator creates the charts from the data available. A **New Chart Wizard** walks the administrator through all of the steps to access the data and format the chart.

Data Sources

OrgPublisher charts hierarchical data (such as person-to-person, position-to-position and department-to-department relationships) from your existing HR system, and automatically creates an org chart based on the hierarchy extracted.

OrgPublisher connects to an ODBC compliant data source and allows for import of data directly from the data source, as well as other sources of data such as XML, CSV, and LDAP. In addition, connections to well known ERP and HR systems such as, PeopleSoft® and Oracle® are easily achieved. Additionally, OrgPublisher for *SAP® solutions* comes with easily customizable SAP® output formats.

For a detailed list of data source options, see Data Sources.

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OrgPublisher Users

There are multiple OrgPublisher user categories, allowing you to be specific about access privileges and the type of published output each user requires:

- Administrators
- Power End Users
- Standard End Users
- Planning Users

For more information on the activities assigned to each user type, see OrgPublisher User Descriptions.

Publishing Options

OrgPublisher provides a variety of publishing options that range from displaying a PDF on your intranet, to interactive charts that are updated on a specified schedule, and interactive charts in a real-time environment.

Once published to your corporate intranet, the data represented on the chart can be used for on-the-fly data analysis and reporting.

For more information on publishing options, see Publishing Options.

Client PC Requirements

User PC requirements will vary depending upon the publishing option and the user role.

For more information on client PC requirements see Client PC Requirements

Web Administration Server

In addition to the regular administrator function, OrgPublisher provides extended capability with the Web Administration Server function that is installed on a Web server. This allows multiple administrators to access OrgPublisher, and it also provides access through any browser on the Internet.

For more information on publishing options, see Web Administration Server.

For more information, please contact Aquire at http://www.aquire.com/.

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Architecture Overview

OrgPublisher architecture consists of four primary components, shown in Figure 1.

1. **A *Data Source*** provides the data to be acted upon to produce the org chart.
2. An ***Org Chart Publishing Computer*** on which OrgPublisher has been installed that enables the org chart administrator to select the appropriate data, apply the appropriate arrangement and formatting components, and publish the final chart for viewing by end users.
3. An ***Intranet Web Server*** or computer to host the published org chart files; may or may not be the same as the publishing computer. The OrgPublisher application utilizes a Windows® platform computer, which can be either a network computer or a Web server. The Apache™ HTTP Server 2.0+ running Windows® is also supported. For large/secure charts using EChart publishing, an ISAPI server with Microsoft® IIS is required.
4. A ***Web Browser*** that provides for interactive viewing of the published org chart information. The selected publishing format prescribes the viewer's experience and capabilities, as well as the required browser components. Publishing choices include Graphic, HTML, EChart Thin Client and PDF (publishing formats that require no additional browser components).

   PluginX and EChart Rich Client options provide interactive org charts that require the installation of the OrgPublisher PluginX component.

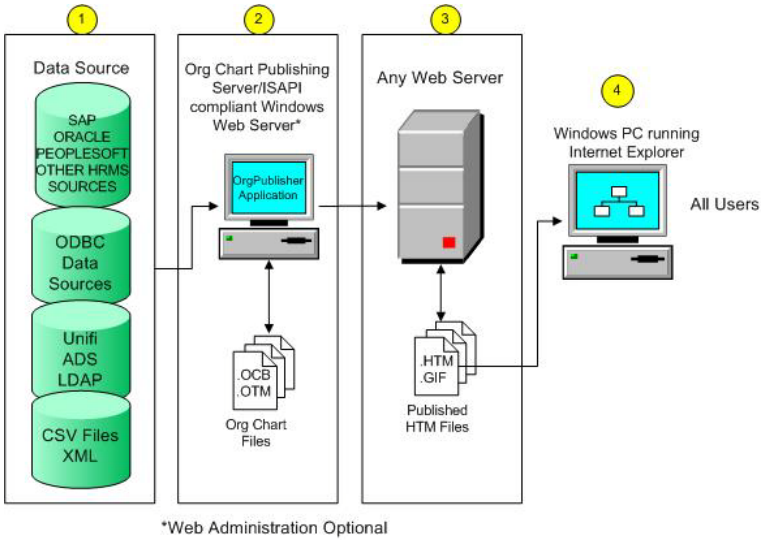

Figure 1

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Data Sources

The data source can be any data source, or any combination of data sources, that contains reporting information. The data source connectivity is accomplished in one of several ways. OrgPublisher provides ODBC, XML, and CSV file connection. Additional connectors for Oracle® HR, Directory Servers, and PeopleSoft® are available from the Aquire Web site. OrgPublisher for *SAP® solutions* is available for SAP® customers.

Additional connectors are available from our Alliance Partners.

Data sources include:

- HR, ERP, and financial systems databases from several vendors such as:
  - SAP®
  - Oracle®
  - PeopleSoft®
- ODBC data sources such as:
  - Microsoft® SQL Server®
  - Microsoft® Access®
  - Oracle®
  - Other ODBC compliant data sources
- Directory Servers such as:
  - Microsoft® Exchange™
  - Microsoft® ADS™
  - Netscape®
  - Novell®
- Other data sources
  - XML data sources
  - CSV (comma separated value) data files

Any combination of two or more ODBC, XML, and text data sources can also be used to build a single chart. The **New Chart Wizard** allows the use of multiple data sources.

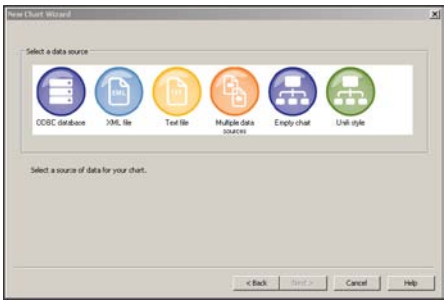

Figure 2

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OrgPublisher User Descriptions

OrgPublisher provides for multiple OrgPublisher user categories, allowing you to be specific about access and/or privileges granted to users.

For user system requirements, see Client PC Requirements.

OrgPublisher User Descriptions	
User Title	**Privileges**
Administrators	The OrgPublisher application is typically installed on the chart administrator's PC, and the administrator is responsible for the following chart functions: • Create • Format • Secure Publish various types of charts, reports, and directories
Power End Users	Power end users can do the following: • Extensive printing capabilities • Search and Group for analysis • Multiple Style Options • Send output to PowerPoint • Could require restricted viewing based on role within the company • Access the OrgPlan Function: o Add, delete, move boxes and departments o Create change report o Send output to another user for review
Standard End Users	Standard end users can access published charts, reports, and directories, providing them with the following:

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OrgPublisher User Descriptions	
User Title	**Privileges**
	• View of the organizational structure • General information, such as phone and e-mail • Limited printing capabilities • Limited search capabilities
Planning Users	Planning users have special privileges allowing them to: • Perform org modeling or succession planning scenarios using our web-based viewing solution

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Publishing Options

Org charts are created using OrgPublisher on a Windows® platform computer (workstation or server) that provides the org chart administrator with the capabilities to select the desired data, associate the appropriate formatting characteristics to data, and publish the chart for viewing by end users.

Installation is straight forward, using a standard wizard driven interface to collect information. The installation is an executable (EXE). At this time a Microsoft®, or Windows®, Installer (MSI) installation version is not available.

The following table provides an overview of the requirements for each of OrgPublisher's publishing options.

Refer to the *Web Administration Installation Guide* to install OrgPublisher on a server for use by multiple administrators or to allow administrator access from any laptop or home computer.

Format	Browser	Client	Server	Criteria for Usage
EChart Rich Client **(I)** Figure 3	Microsoft® Internet Explorer 6 and later	Microsoft®, Windows® XP, Windows® Vista™, and Windows® 7 operating system	Requires a Microsoft® IIS (ISAPI enabled) Windows® 2003 Web server, Windows® 2008 Web server or Apache™ HTTP Server 2.0+ running Windows®	Fast performance for medium to very large company. Security at chart, hierarchical or field level. Feature rich options for end users. Intended for power users and regular users.
EChart Thin Client **(I)** Figure 4	Microsoft® Internet Explorer 6 and later	Cross platform such as Mac® and UNIX (With JavaScript turned off)	Requires a Microsoft® IIS (ISAPI enabled), Windows® 2003 Web server, Windows® 2008 Web server or Apache™ HTTP Server 2.0+ running Windows®	Works in Locked Down Client Environment or Non-Windows; Security at chart, hierarchical or field level; Not as many features as Rich Client. Intended for regular users.

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Format	Browser	Client	Server	Criteria for Usage
PluginX **(I)** Figure 5	Microsoft® Internet Explorer 6 and later	Microsoft®, Windows® XP, Windows® Vista™, or Windows 7, operating system	Requires a Microsoft® IIS (ISAPI enabled), Windows® 2003 Web server, Windows® 2008 Web server or Apache™ HTTP Server 2.0+ running Windows®	Chart level Password Security; Full choices for End User functionality. Intended for all users.
HTML **(D)** Figure 6	Microsoft® Internet Explorer 6 and later	Cross platform such as UNIX and Mac	Requires a Microsoft® IIS (ISAPI enabled), Windows® 2003 Web server, Windows® 2008 Web server or Apache™ HTTP Server 2.0+ running Windows®	Windows® or Non-Windows locked down Environment; Not as many features as PluginX. Intended for all users.
PDF **(D)** Figure 7	Free Adobe Acrobat Reader Version 9	Cross platform reader in browser	Requires a Microsoft® IIS (ISAPI enabled), Windows® 2003 Web server, Windows® 2008 Web server. or Apache™ HTTP Server 2.0+ running Windows®	You can print or email document. Intended for all users.
Real-time **(I)** Figure 8	Microsoft® Internet Explorer 6 and later	Microsoft® Windows® XP, Windows® Vista™, or Windows 7 operating system	Requires Microsoft® IIS (ISAPI enabled), Windows® 2003 Web server, Windows® 2008 Web server,	EChart, rich or thin client, option created from an ODBC connection to an Oracle®, SQL Server2000 or SQL Server 2005 database. Must be published to virtual directory.

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Format	Browser	Client	Server	Criteria for Usage
			or Apache™ HTTP Server 2.0+ running Windows®, MDAC 2.6 and later, ASP.NET support	**Note:** Real-time publishing is not available when building charts from multiple data sources.

I = Interactive Charts (includes advanced search, navigation, printing and querying).
D = Document type charts.

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EChart Rich Client Topology

EChart Rich Client is recommended for large or secure implementations. It provides fast performance for medium to very large charts and provides field level security and Microsoft® Active Directory authentication.

It is intended for end power users and end standard users.

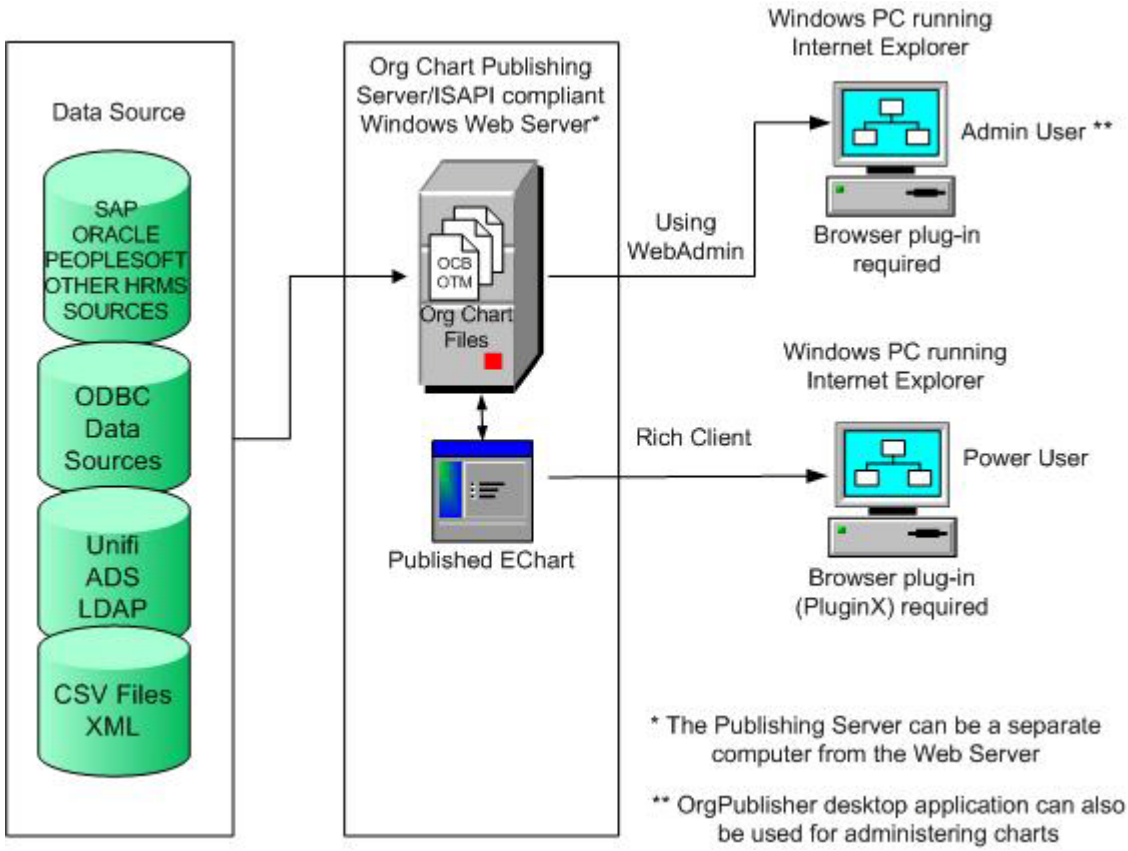

Figure 3

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EChart Thin Client Topology

EChart Thin Client utilizes the server rather than individual user workstations to process the org chart. The EChart Thin server hardware requirements can vary depending on a number of factors, such as number of records charted, number of custom fields, concurrent users, whether the servers are dedicated to only this function or not, and so on. Ultimately, load testing in the working environment will determine the final configuration.

Thin Client works in Locked Down Client Environment or Non-Windows® Security at chart hierarchical or field level. It does not have as many features as Rich Client.

It is intended for regular users.

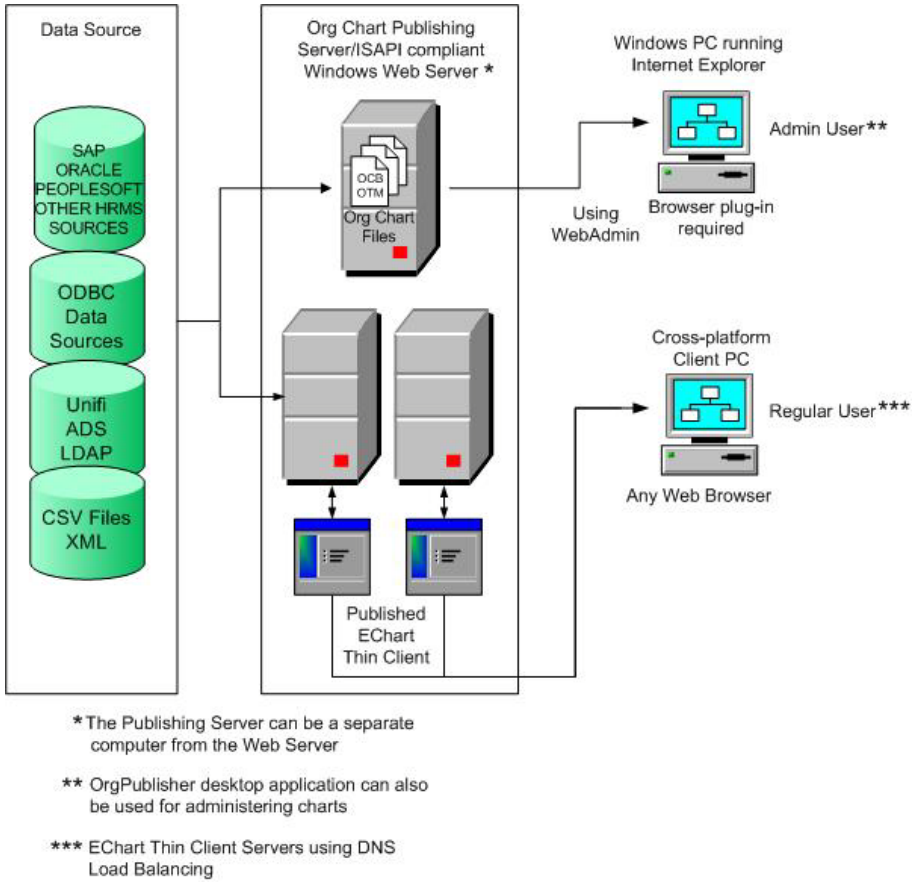

Figure 4

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EChart Real-time Topology

Real-time charts provide users with immediate access to up-to-date information. Dynamic organizational charts are generated using real-time access for MS SQL, Oracle®, or Microsoft® Access data source, and then published in EChart format.

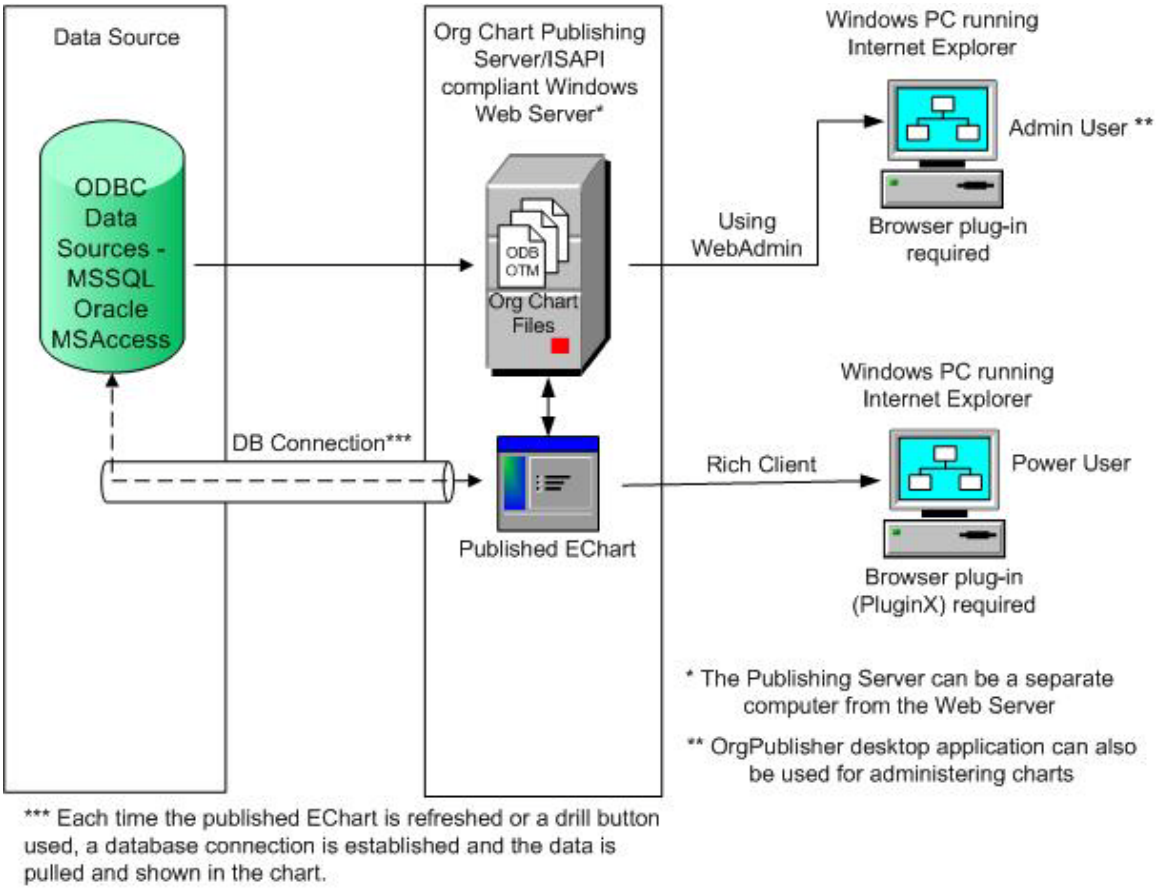
Data Source
ODBC Data Sources - MSSQL Oracle MSAccess
Org Chart Publishing Server/ISAPI compliant Windows Web Server*
ODB OTM
Org Chart Files
Windows PC running Internet Explorer
Admin User **
Using WebAdmin
Browser plug-in required
DB Connection***
Published EChart
Rich Client
Windows PC running Internet Explorer
Power User
Browser plug-in (PluginX) required
* The Publishing Server can be a separate computer from the Web Server
** OrgPublisher desktop application can also be used for administering charts
*** Each time the published EChart is refreshed or a drill button used, a database connection is established and the data is pulled and shown in the chart.

Figure 5

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PluginX Topology

PluginX provides end users with the richest interactive experience, allowing them to navigate and search the chart, create their own groups, access hotspot links, and provide accessibility to the visually impaired.

PluginX provides chart level Password Security with full choices for user functionality.

It is intended for all users.

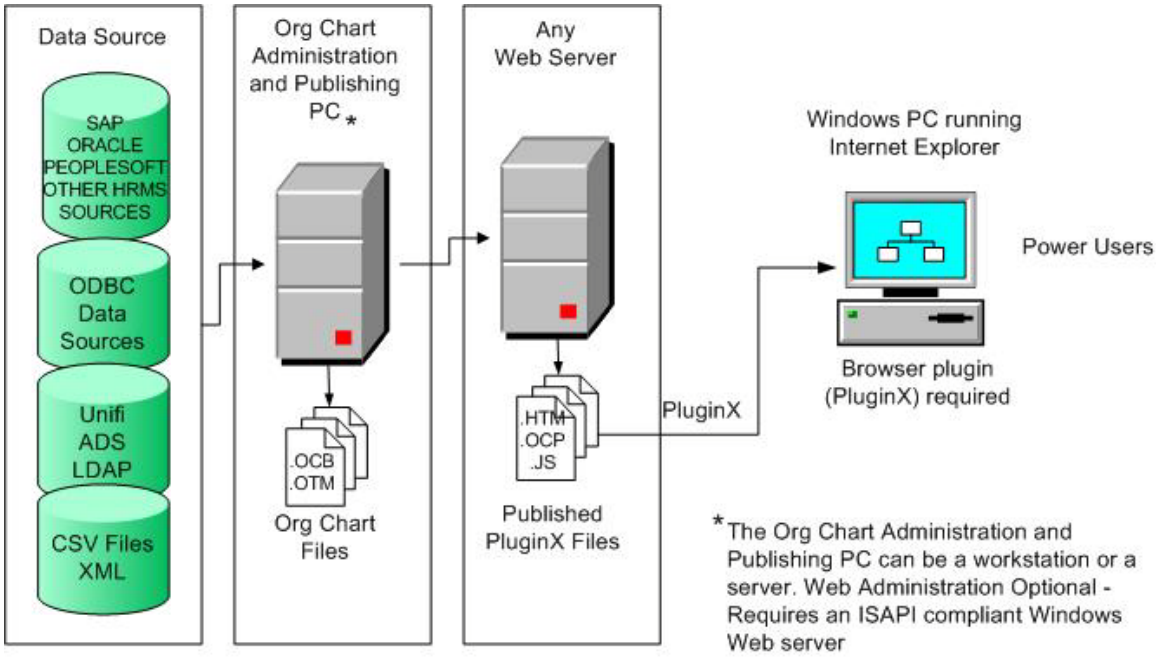

Figure 6

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HTML Topology

HTML published charts can contain basic interactive elements, such as drilling, hotspots, displayable views, and the email to a group feature.

It operates in a Windows® or Non-Windows locked down environment. This publishing option does not provide as many features as PluginX.

HTML charts are intended for all users.

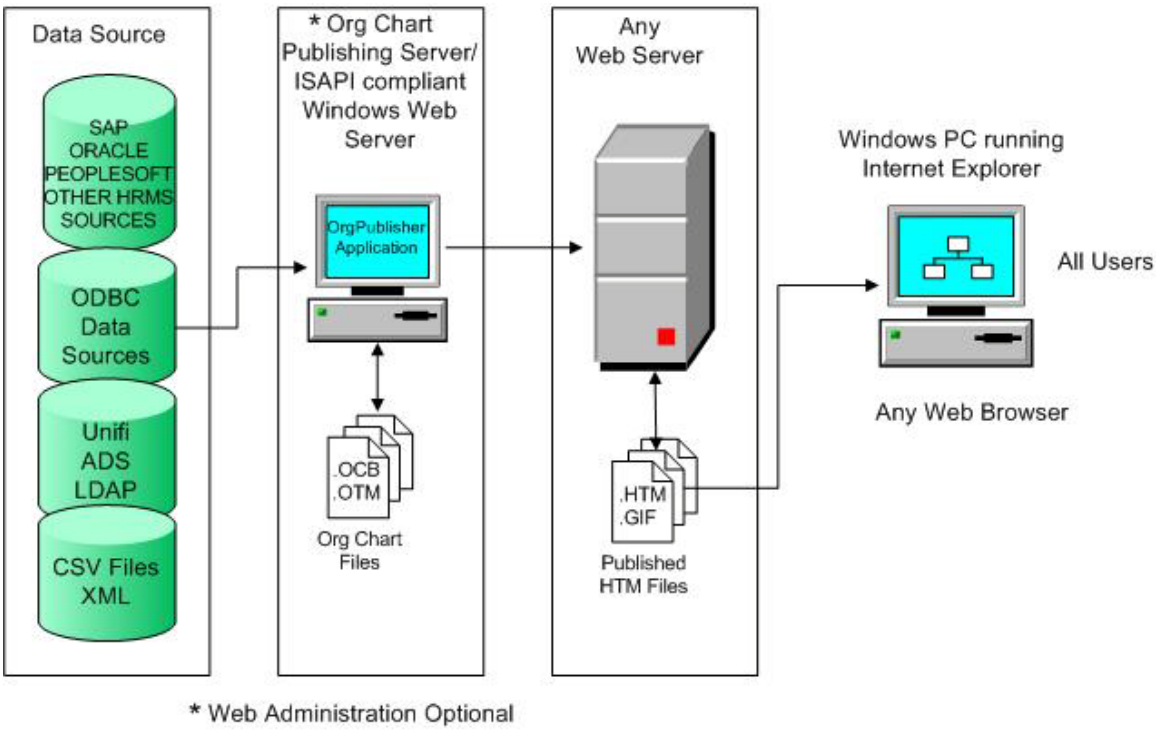

Figure 7

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PDF Topology

With this publishing option you can choose chart styles, the top of chart box, and print in Book style. In addition, this is the EChart thin client printing option. End users must have the Adobe® Acrobat® Reader® 9 software installed on their PCs.

Documents published in PDF can be printed or e-mailed.

This publishing option is intended for all users.

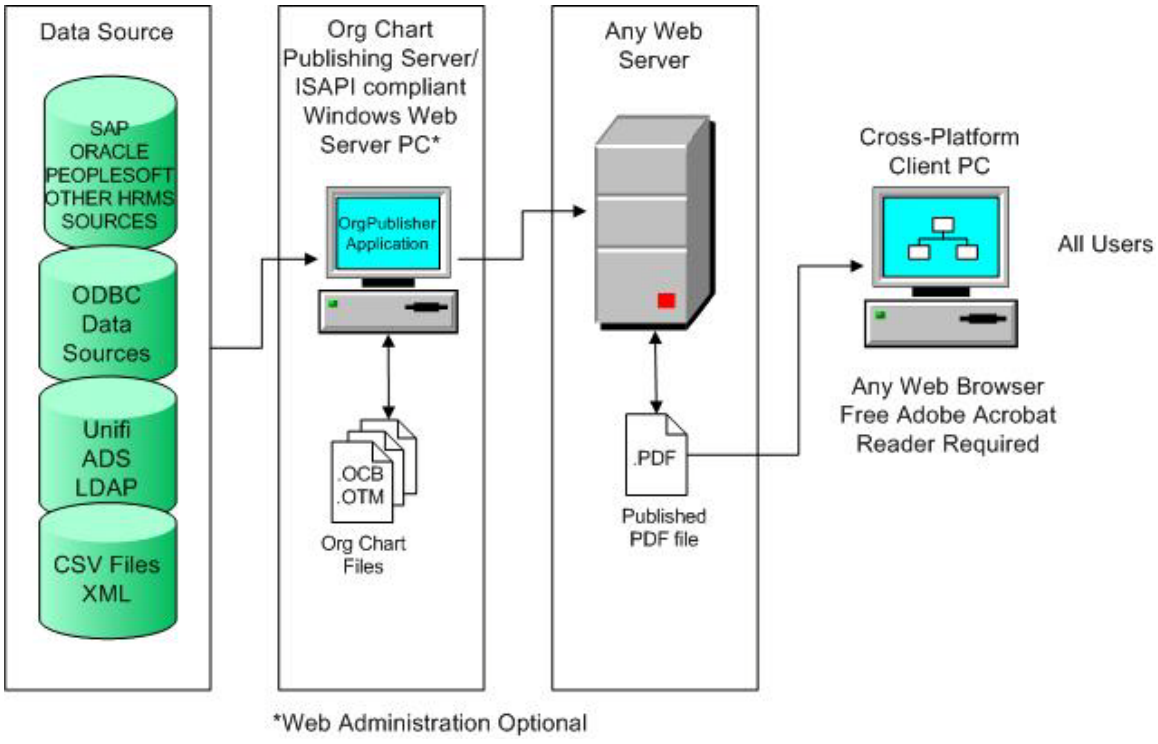

Figure 8

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Web Administration Server Topology

OrgPublisher works much the same in Web Administration as it does in the desktop. The OrgPublisher Web Administration host runs as an ActiveX control that accesses files and data on a Web server. OrgPublisher with Web Administration is installed to a Web server and is accessed with a Web page. Because all chart files exist on the Web server, you can open any chart from any workstation.

For each server installation, a single folder is created for source charts called **SourceCharts** and another one for published charts called **PublishedCharts**. In addition, an HTML file named **OPAdmin.htm** is created to host the Web Administration client. Microsoft® Internet Information Server (IIS) provides security by allowing only chart administrators to access the source directory on the Web server. The IIS account must have full access to the virtual directory containing the remote server DLL. This is necessary because the server DLL reads, writes, and deletes files.

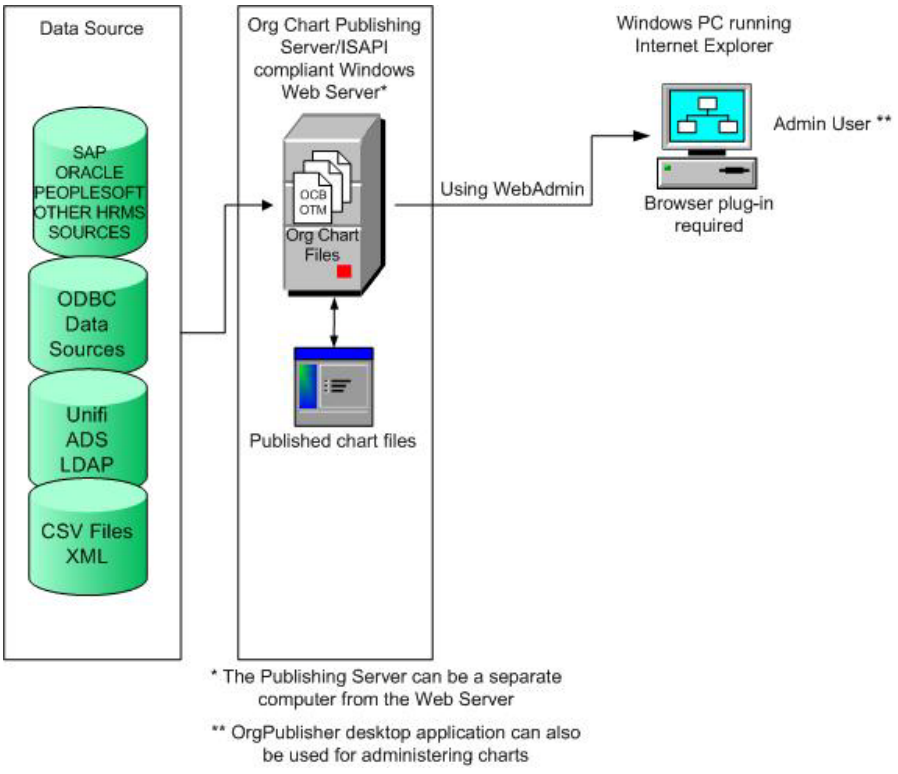

Figure 9

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OrgPlan

OrgPlan™ provides the ability for selected individuals to create and share organizational models. These charts contain different menus from the standard published charts.

The OrgPlan feature is available in PluginX or EChart Rich Client publishing.

OrgPlan Topology

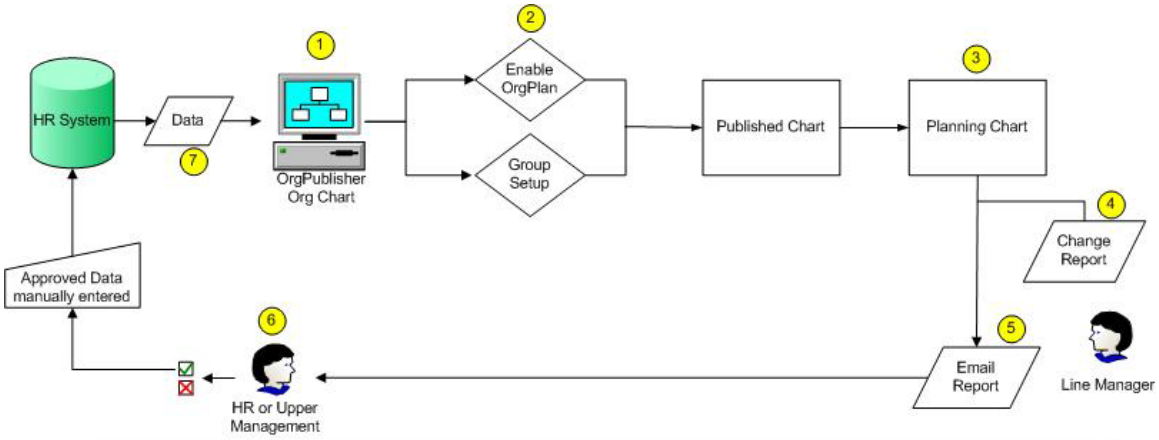
HR System
Data
OrgPublisher Org Chart
Enable OrgPlan
Group Setup
Published Chart
Planning Chart
Change Report
Email Report
Line Manager
HR or Upper Management
Approved Data manually entered
1. OrgPublisher automatically generates the org chart from the HR system.
2. The OrgPublisher Administrator turns on the OrgPlan feature and creates a Group to determine who will see/use this feature.
3. Line managers click on the Planning button in the published charts and complete their planning graphically with drag and drop/ cut and paste.
4. Line managers click on the Report button to review the list and summary of all changes they have just planned.
5. Line managers click on the Send button to e-mail their planning chart and change report to HR or to upper management for approval.
6. Once approved or adjusted by upper management or HR, the change reports in HTML or Excel format are then used as a human readable document so changes can be manually keyed into the HR system
7. OrgPublisher automatically generates the org chart from the HR system which contain the planned changes.

Figure 10

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Client PC Requirements

Administrator and OrgPlan Users

To publish cross-platform HTML charts that can reside on any Web server, on any platform, to be read by any Web browser, OrgPublisher requires the following:

- Pentium® PC compatible or greater
- Windows® XP, Windows® Vista™, or Windows 7 operating system
- 512 MB of RAM
- 60 MB available hard disk space
- Adequate storage space for charts

Chart Viewing for Power End Users

Browser Requirements for OrgPublisher™ PluginX:

- Pentium® PC compatible or greater
- Windows® XP, Windows® Vista™, or Windows 7 operating system
- 512 MB of RAM
- 60 MB available hard disk space
- Microsoft® Internet Explorer 6 and later for all versions of Windows® mentioned above

Chart Viewing for Standard End Users

Browser Requirements for Thin Client:

- Pentium® PC compatible or greater
- Windows® XP, Windows® Vista™, or Windows 7 operating system
- 256 MB of RAM
- 60 MB available hard disk space
- Microsoft® Internet Explorer 6 and later for all versions of Windows® mentioned above

Optional Server Requirements

EChart Rich / Thin Server Requirements

- Pentium® PC compatible or greater
- A Microsoft® IIS (ISAPI enabled) Windows® XP, Windows® 2003 Web server, Windows® 2008 Web server, or Apache™ HTTP Server 2.0+ running Windows® operating system

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- A virtual directory with execute permissions for scripts and executables on the Web server
- 60 MB available hard disk space
- 1GB of RAM minimum, depending on chart size

EChart Thin Client utilizes the server rather than individual user workstations to process the org chart. The EChart Thin server hardware requirements can vary depending on a number of factors, such as number of records charted, number of custom fields, concurrent users, whether the servers are dedicated to only this function or not, and so on. Ultimately, load testing in the working environment will determine the final configuration.

The following table lists recommendations that can serve as a starting point for estimating hardware requirements for Thin Client.

EChart Thin Client Number of Records	Dual Load Balanced Server Processor	GHz	Memory	Dedicated vs Shared Server Memory
up to 1000	P4	2	512MB	1GB
1001 to 5000	P4	2.5 – 3	1GB	1.5GB
5001 to 15000	P4	3	1GB	1.5GB
15001 to 25000	Dual P4	3	2GB	2GB
25000 and up	Dual P4 Hyper Threaded	3	2GB	2GB

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Web Admin Server Requirements

- Pentium® PC compatible or greater
- A Microsoft® IIS (ISAPI enabled), Windows® XP, Windows® 2003 Web server, Windows® 2008 Web server or Apache™ HTTP Server 2.0+ running Windows® operating system
- A virtual directory with execute permissions for scripts and executables on the Web server
- 60 MB available hard disk space
- 1GB MB of RAM

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OrgPublisher Installation

The purpose of this document is to provide the information needed to install OrgPublisher in your facility.

Note: *If you are starting with a trial version you will use a Trial License Key until you purchase OrgPublisher. When you purchase the Retail Version of OrgPublisher an e-mail will be sent to the registered owner containing the following information:*

- A new Retail License Key
- Registered Company Name
- Download Instructions

To convert an installed trial version to the retail version see the following section:

Converting a Trial Version to a Retail Version

After your purchase of OrgPublisher is complete you will receive an e-mail confirming your Company as a Registered company. The e-mail will also include your retail license key. You have two options for converting the trial version to the retail version.

Option 1

While your trial version is in effect, each time you sign in to OrgPublisher, the *OrgPublisher Trial Version* dialog opens:

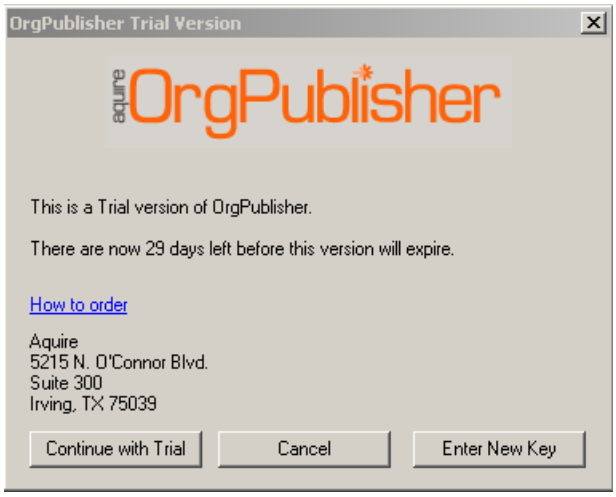

Figure 1

1. To convert your trial version to the retail version, click **Enter New Key**

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The *License Key Entry* dialog opens.

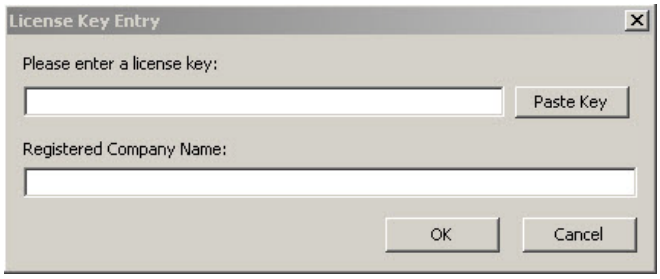

Figure 2

2. From the e-mail you received with your License Key, copy and paste the **Retail License key** and the **Registered Company Name** in the appropriate fields, and then click **OK**.

   The conversion of the retail version is complete once OrgPublisher is closed and reopened.

Option 2

1. Open OrgPublisher.
2. On the **Help** menu, select **License Information**.

   The *Licensing Information* dialog opens.

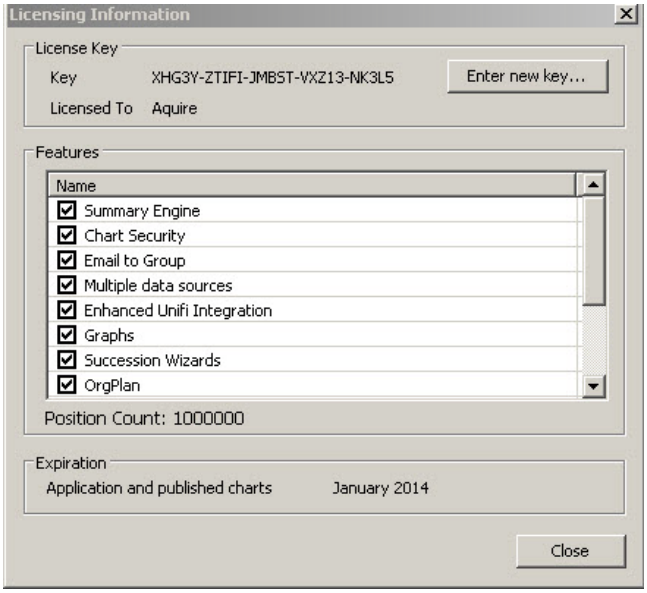

Figure 3

3. Click **Enter new key**.

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The *License Key Entry* dialog opens.

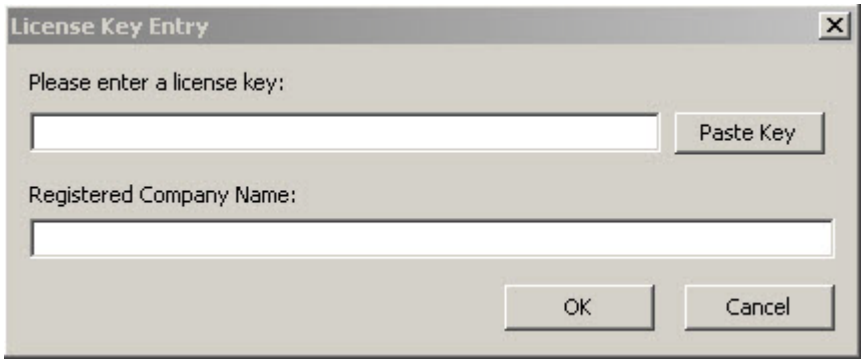

Figure 4

4. From the e-mail you received with your License Key, copy and paste the **Retail License key** and the **Registered Company Name** in the appropriate fields, and then click **OK**.

   The conversion of the retail version is complete once OrgPublisher is closed and reopened.

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Install Information Check List

The following is a check list of information you will need during the install process. If you gather and record the information in the table before you start, it will speed up the install.

OrgPublisher Application Install Check List		
Issue	**What is this?**	**Your Company Information**
License key	The **License key** and **Registered Company Name** information will be provided to you via an e-mail.	
Registered Company Name	Your company name, as it appears in the above mentioned e-mail.	
Registered user's full name	The registered user's name as it appears in your communications with Aquire.	
Registered user's company name	Same as the Registered Company Name.	
Regular Install or Custom Install	**OrgPublisher Install** is the default and should be selected if you are installing on a Windows® XP workstation, Windows® Vista® workstation, or on a Server where you do not require the installation of Web Administration Server. **Custom Install** must be selected if you are installing the **Web Administration** Server option. Go to the following Web site if you need help to decide which installation you require. http://www.aquire.com/support/faq/faq.aspx?dept=OrgPublisher&qid=284	

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Install OrgPublisher Step-by-Step

Note: *If you fill out the Install Information Check List above before you start, you can expedite the install.*

1. From the computer where you want the OrgPublisher application to be installed, access the aquire.com Web site. http://www.aquire.com/

   Click **Downloads**, and then select the version of OrgPublisher appropriate for your installation.

Note: *if you need assistance with this choice, contact http://www.aquire.com/support/.*

After the registration process is complete, select Install.

The *Activation Information* dialog box opens.

OrgPublisher 9 Enterprise Edition Trial Installation
Activation Information
Please enter the license key and registered company name assigned to the registered OrgPublisher 9 Enterprise Edition Trial owner.
License key:
Registered Company Name:
Note:
If you do not have a license key, please click the More Information button.
OrgPublisher
aquire
VERSION 9
More Information
< Back
Next >
Cancel

Figure 5

2. Enter the **License key** and your **Registered Company Name**, and then click **Next**.

   The *Welcome!* dialog opens.

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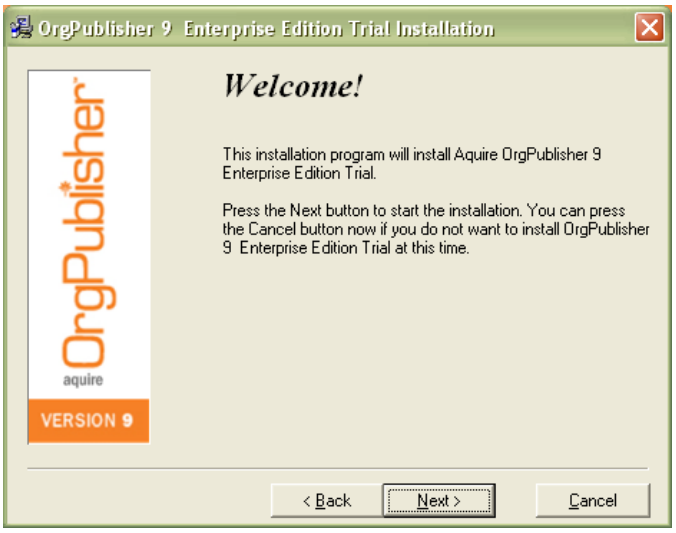
OrgPublisher 9 Enterprise Edition Trial Installation
Welcome!
This installation program will install Aquire OrgPublisher 9 Enterprise Edition Trial.
Press the Next button to start the installation. You can press the Cancel button now if you do not want to install OrgPublisher 9 Enterprise Edition Trial at this time.
< Back
Next >
Cancel

Figure 6

3. To start the install, click **Next**.

   -or-

   If you *do not* wish to continue the install at this time, click **Cancel**.

   - If you select **Cancel**, you can access the **.exe** and start the install later.
   - If you select **Next**, the *License Agreement* dialog opens.

License Agreement
License Agreement
NOTICE TO USER: READ BEFORE INSTALLING SOFTWARE
THIS IS A CONTRACT. BY INSTALLING THIS SOFTWARE YOU ACCEPT ALL THE TERMS AND CONDITIONS OF THIS AGREEMENT. THIS SOFTWARE IS MADE AVAILABLE FOR EVALUATION TESTING AND IS SUBJECT TO AN EXPIRATION DATE. FULLY LICENSED VERSIONS OF THIS SOFTWARE ARE AVAILABLE FOR PURCHASE FROM Aquire, INC. www.Aquire.com, OR FROM THE ADDRESS LISTED AT THE BOTTOM OF THIS AGREEMENT.
If you do not agree to the terms of this agreement, do not install this software.
Aquire ORGPUBLISHER 9 LICENSE AGREEMENT AND
< Back
Agree >
Cancel

Figure 7

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4. To read and accept the *OrgPublisher License Agreement*, click **Agree**.

   The *Registration Information* dialog box opens.

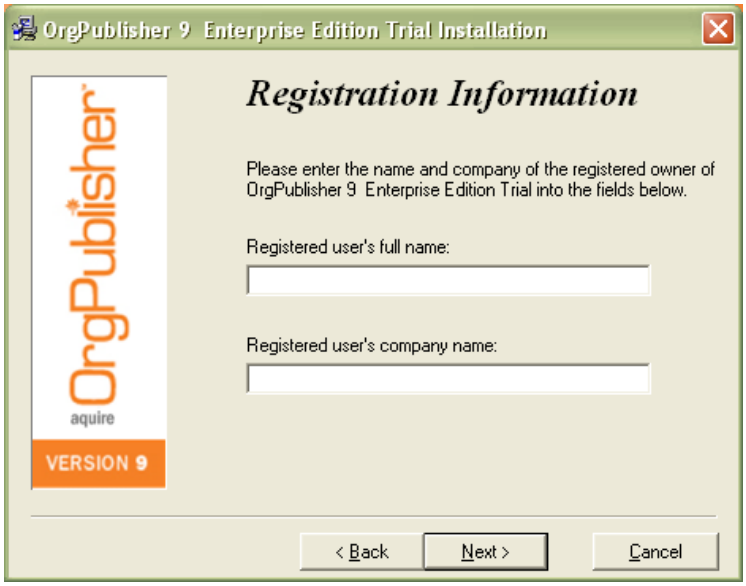
OrgPublisher 9 Enterprise Edition Trial Installation
Registration Information
Please enter the name and company of the registered owner of OrgPublisher 9 Enterprise Edition Trial into the fields below.
Registered user's full name:
Registered user's company name:
OrgPublisher
aquire
VERSION 9
< Back
Next >
Cancel

Figure 8

5. Enter the **Registered user's full name.**

   -and-

   Enter the **Registered user's company name**, and then click **Next**.

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The *Custom Installation Option* dialog box opens.

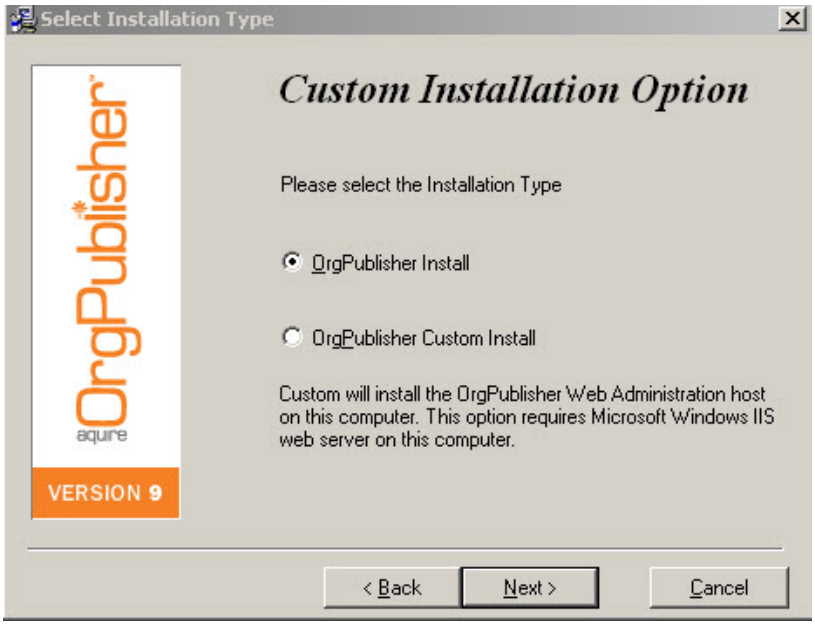
Select Installation Type
Custom Installation Option
Please select the Installation Type
OrgPublisher Install
OrgPublisher Custom Install
Custom will install the OrgPublisher Web Administration host on this computer. This option requires Microsoft Windows IIS web server on this computer.
VERSION 9
< Back
Next >
Cancel

Figure 9

6. Depending on the installation method that you chose in the Install Check List, select the appropriate option for the required install.

   Click **Next**.

NOTE: *If you require Web Administration and you chose the OrgPublisher Custom Install option, please skip to Installing OrgPublisher Web Administration to complete your install.*

If you selected **OrgPublisher Install**, the *Select Destination Directory* dialog opens.

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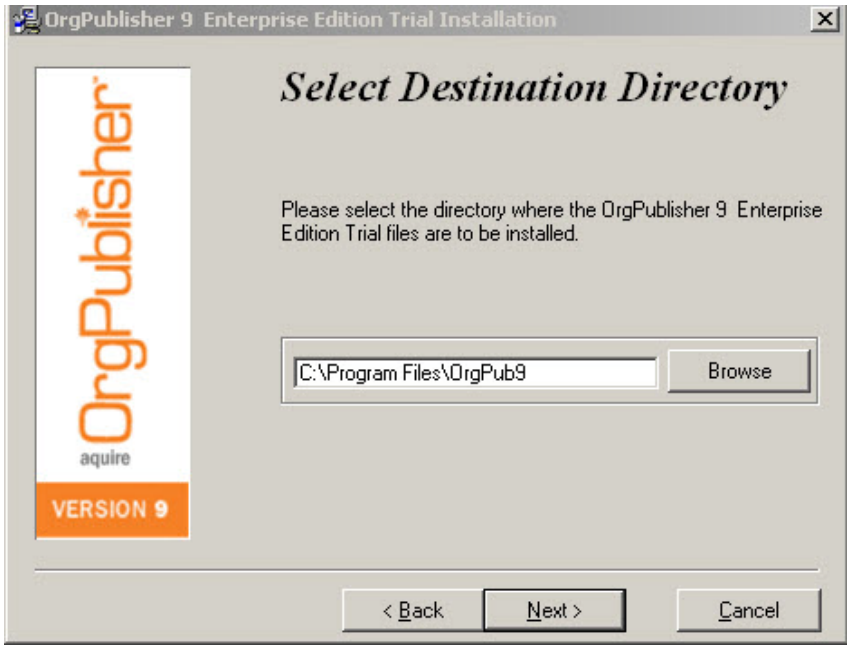

Figure 10

7. You can accept the default shown, or you can type or **Browse** to a different path for the setup program, and then click **Next**.

   An *Installing* window opens and provides a progress status as OrgPublisher is installed.

   When the install is complete, the *Installation Completed!* dialog box opens and confirms that OrgPublisher is successfully installed and provides preselected options for:

   - Creating an OrgPublisher icon on your desktop
   - Launching OrgPublisher immediately after the install
   - Viewing the *Getting Started Guide*

Note: *The OrgPublisher Getting Started Guide and the User manual can be found under Start, Programs, OrgPublisher 9.*

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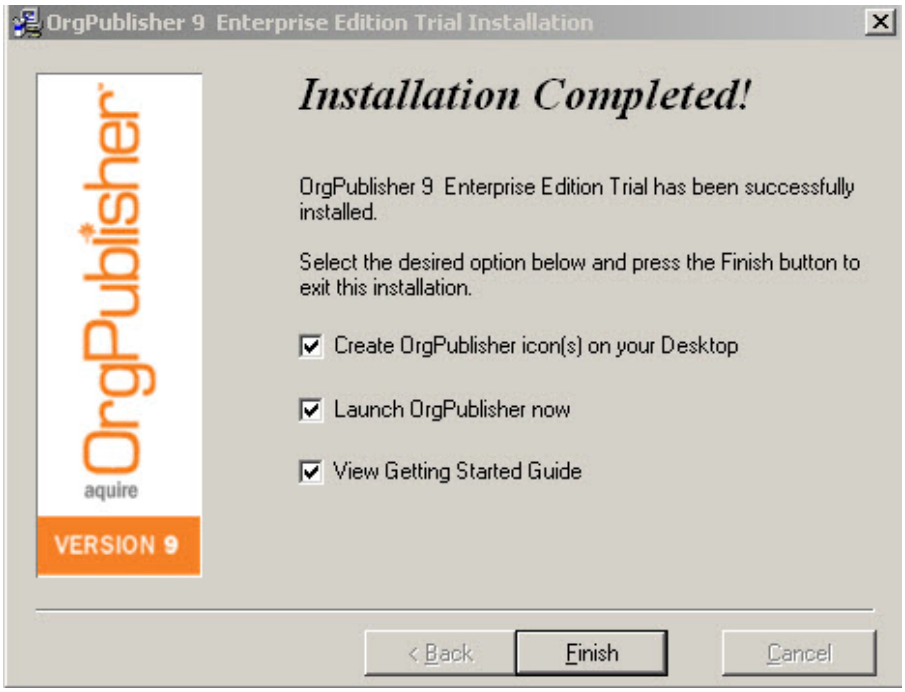
OrgPublisher 9 Enterprise Edition Trial Installation
Installation Completed!
OrgPublisher 9 Enterprise Edition Trial has been successfully installed.
Select the desired option below and press the Finish button to exit this installation.
Create OrgPublisher icon(s) on your Desktop
Launch OrgPublisher now
View Getting Started Guide
< Back
Finish
Cancel
OrgPublisher
aquire
VERSION 9

Figure 11

8. After deciding whether to clear any of the options, click **Finish.**

   Your OrgPublisher installation is complete.

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Installing OrgPublisher Web Administration

Note: To install OrgPublisher Web Administration, start by following Steps 1 through 6 in the *Installing OrgPublisher Step-By-Step* in this document.

In Step 6, of the Step-by-Step process, select the ***Custom Install*** option, and proceed to Step 1 below.

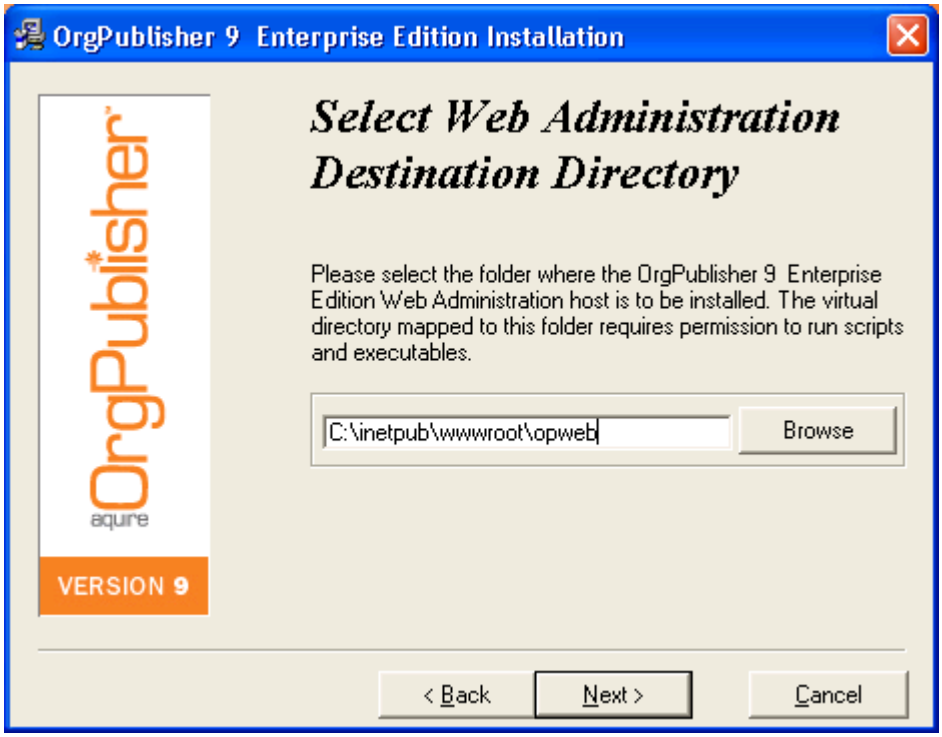
OrgPublisher 9 Enterprise Edition Installation
Select Web Administration Destination Directory
Please select the folder where the OrgPublisher 9 Enterprise Edition Web Administration host is to be installed. The virtual directory mapped to this folder requires permission to run scripts and executables.
C:\inetpub\wwwroot\opweb
Browse
VERSION 9
< Back
Next >
Cancel

Figure 12

1. The default Web server folder is *C:\inetpub\wwwroot*. Append \OPWEB to the end of the path so that it looks like **C:\inetpub\wwwroot\opweb.**

Note: *This will be the physical path to the virtual directory, as described in the Web Administration setup document. The opweb folder will be created during the install.*

Click **Next.**

The *Enter The Web Administration URL* dialog opens.

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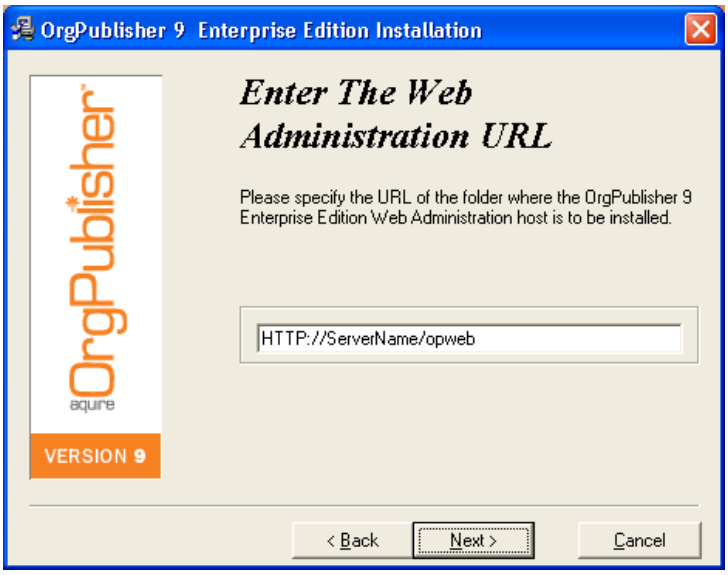
OrgPublisher 9 Enterprise Edition Installation
Enter The Web Administration URL
Please specify the URL of the folder where the OrgPublisher 9 Enterprise Edition Web Administration host is to be installed.
HTTP://ServerName/opweb
< Back
Next >
Cancel

Figure 13

2. If you took the suggested path above, your URL will likely be as shown. If another path is used, type the correct URL.

   Click **Next**.

   The *Select Destination Directory* dialog box opens.

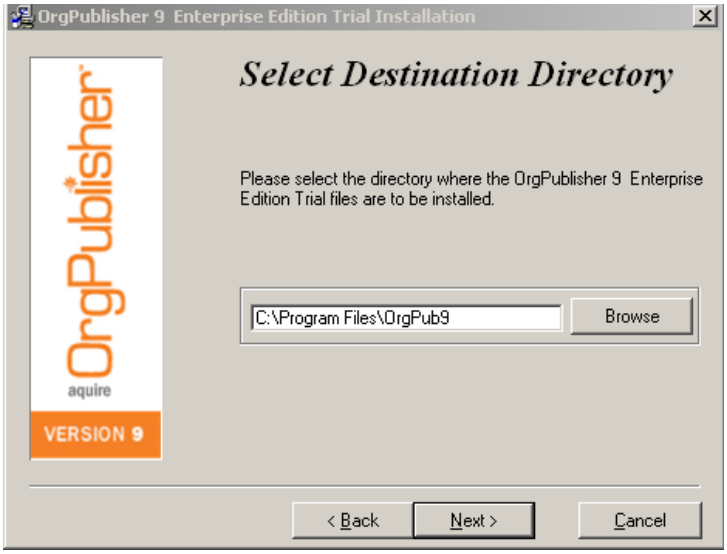
OrgPublisher 9 Enterprise Edition Trial Installation
Select Destination Directory
Please select the directory where the OrgPublisher 9 Enterprise Edition Trial files are to be installed.
C:\Program Files\OrgPub9
Browse
< Back
Next >
Cancel

Figure 14

3. Accept the default path which is **C:\Program Files\OrgPub9,** or choose the desired path for installation.

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Click **Next.**

The *Installation Complete* dialog box opens.

When the install is complete, the *Installation Completed!* dialog box opens and confirms that OrgPublisher is successfully installed and provides preselected options for:

- Creating an OrgPublisher icon on your desktop
- Launching OrgPublisher immediately after the install
- Viewing the *Getting Started Guide*

Note: *The OrgPublisher Getting Started Guide and the User manual can be found under Start, Programs, OrgPublisher 9.*

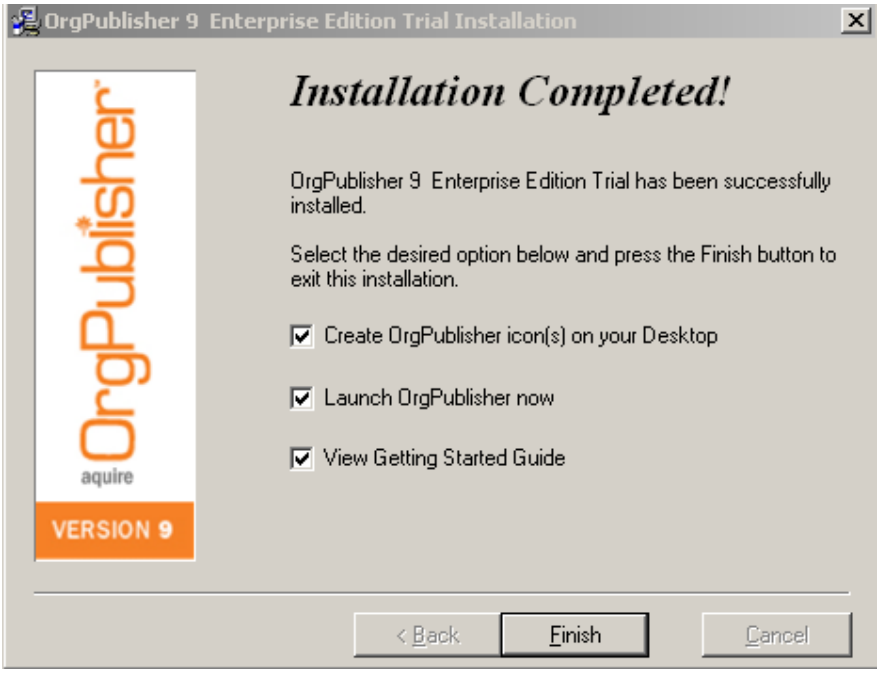
OrgPublisher 9 Enterprise Edition Trial Installation
Installation Completed!
OrgPublisher 9 Enterprise Edition Trial has been successfully installed.
Select the desired option below and press the Finish button to exit this installation.
Create OrgPublisher icon(s) on your Desktop
Launch OrgPublisher now
View Getting Started Guide
aquire
VERSION 9
< Back
Finish
Cancel

Figure 15

4. Select the desired options, and then click **Finish**.

   OrgPublisher Web Administration Setup is complete.

   The following graphic displays a sample of the folders and files created by the Web Administration Server.

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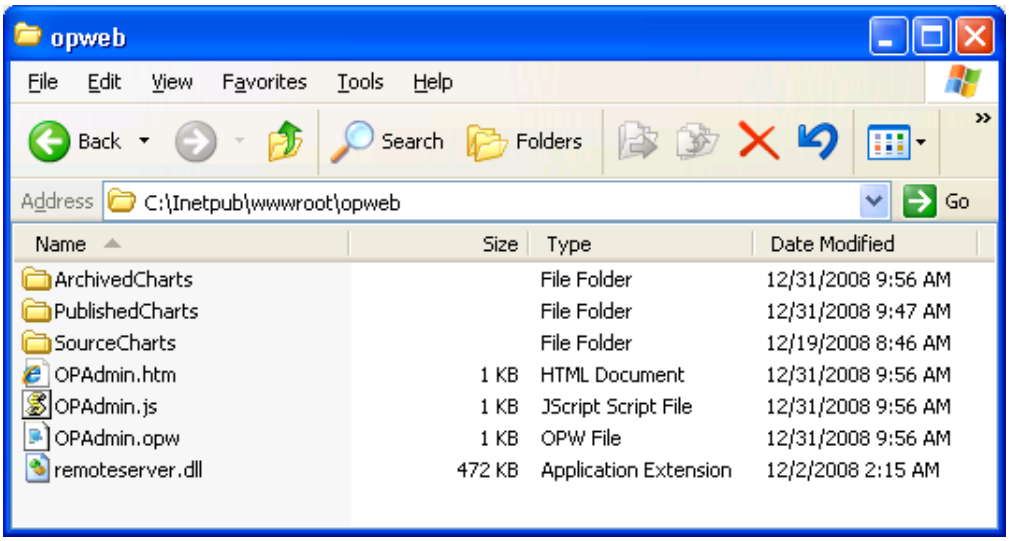
opweb
File Edit View Favorites Tools Help
Back Search Folders
Address C:\Inetpub\wwwroot\opweb
Go
Name Size Type Date Modified
ArchivedCharts File Folder 12/31/2008 9:56 AM
PublishedCharts File Folder 12/31/2008 9:47 AM
SourceCharts File Folder 12/19/2008 8:46 AM
OPAdmin.htm 1 KB HTML Document 12/31/2008 9:56 AM
OPAdmin.js 1 KB JScript Script File 12/31/2008 9:56 AM
OPAdmin.opw 1 KB OPW File 12/31/2008 9:56 AM
remoteserver.dll 472 KB Application Extension 12/2/2008 2:15 AM

Figure 16

Note: *Proceed with the following steps to set NTFS, IIS and DCOM permissions.*

These steps require administrative rights to the Web server. Please consult your systems administrator to complete the next steps.

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Setting NTFS and IIS

The following graphic displays the NTFS rights, as well as the group and rights creation process.

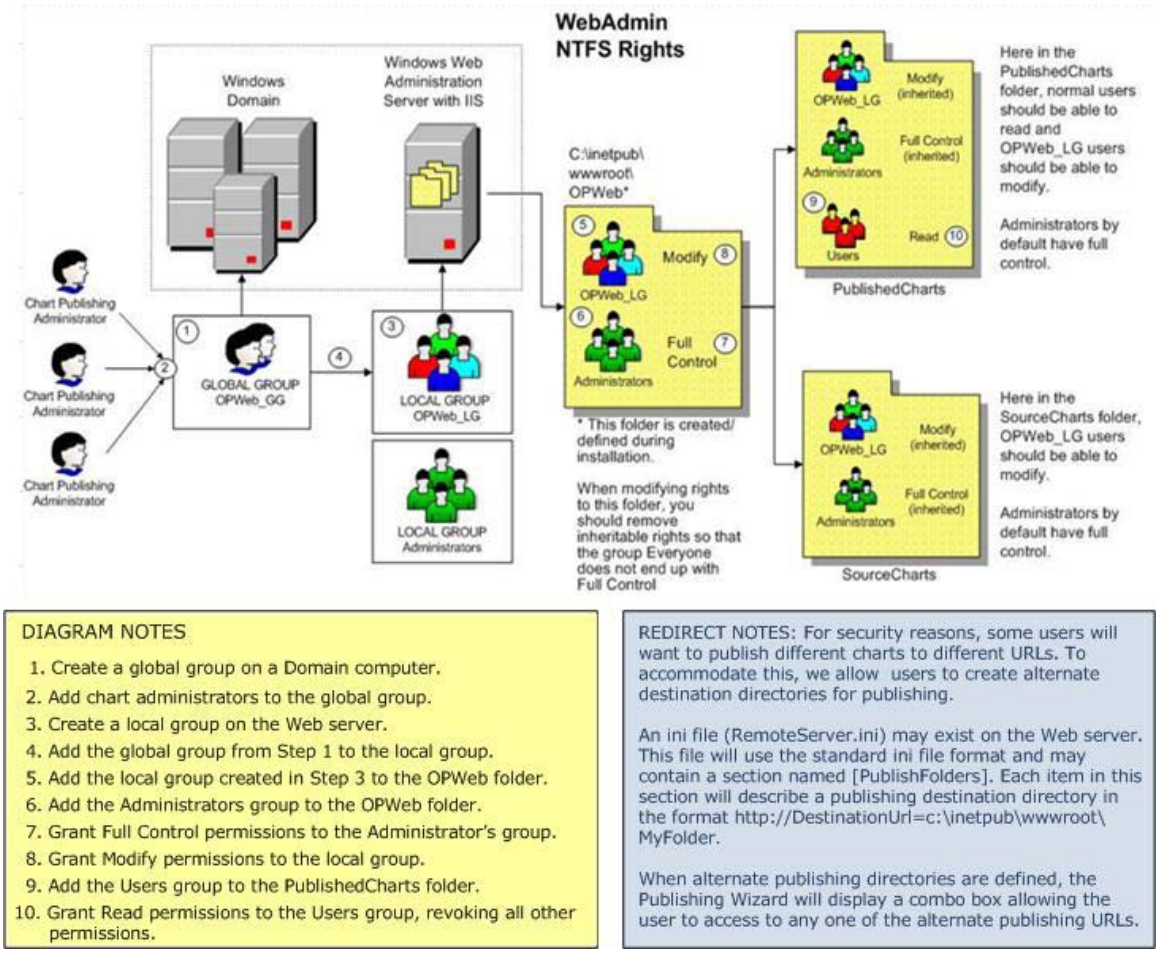
WebAdmin
NTFS Rights
Windows Domain
Windows Web Administration Server with IIS
Chart Publishing Administrator
Chart Publishing Administrator
Chart Publishing Administrator
GLOBAL GROUP OPWeb_GG
LOCAL GROUP OPWeb_LG
LOCAL GROUP Administrators
C:\inetpub\ wwwroot\ OPWeb*
OPWeb_LG
Modify
Administrators
Full Control
* This folder is created/ defined during installation.
When modifying rights to this folder, you should remove inheritable rights so that the group Everyone does not end up with Full Control
OPWeb_LG
Modify (inherited)
Administrators
Full Control (inherited)
Users
Read
PublishedCharts
Here in the PublishedCharts folder, normal users should be able to read and OPWeb_LG users should be able to modify.
Administrators by default have full control.
OPWeb_LG
Modify (inherited)
Administrators
Full Control (inherited)
SourceCharts
Here in the SourceCharts folder, OPWeb_LG users should be able to modify.
Administrators by default have full control.
DIAGRAM NOTES
1. Create a global group on a Domain computer.
2. Add chart administrators to the global group.
3. Create a local group on the Web server.
4. Add the global group from Step 1 to the local group.
5. Add the local group created in Step 3 to the OPWeb folder.
6. Add the Administrators group to the OPWeb folder.
7. Grant Full Control permissions to the Administrator's group.
8. Grant Modify permissions to the local group.
9. Add the Users group to the PublishedCharts folder.
10. Grant Read permissions to the Users group, revoking all other permissions.
REDIRECT NOTES: For security reasons, some users will want to publish different charts to different URLs. To accommodate this, we allow users to create alternate destination directories for publishing.
An ini file (RemoteServer.ini) may exist on the Web server. This file will use the standard ini file format and may contain a section named [PublishFolders]. Each item in this section will describe a publishing destination directory in the format http://DestinationUrl=c:\inetpub\wwwroot\ MyFolder.
When alternate publishing directories are defined, the Publishing Wizard will display a combo box allowing the user to access to any one of the alternate publishing URLs.

Figure 17

Please contact support@aquire.com for further assistance.

Phone: +1 214.574.5020
Fax: +1 214.574.5014
Toll-free: +1 888.674.2427

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Create Global and Local Groups

On the Domain Controller

Create a Global Group (**OPweb_GG**) on the Domain Controller and add the OrgPublisher Web Administrators to the global group.

On the Web Server

Create a Local Group (**OPweb_LG**) on the Web Server and add the **OPweb_GG** to the local group.

Set NTFS Permissions

NTFS (New Technology File System) is used to secure and restrict access to files and folders on the Web server. NTFS also provides the ability to encrypt files and folders to protect your sensitive data.

1. In **Windows Explorer**, browse to: **C:\inetpub\wwwroot\opweb**. Click **opweb,** choose **Properties**, and then select the **Security** tab.

2. Click **Add**, and change the **Domain** selection in the **Look in** field to the **Server** selection. Give the following NTFS permissions:
   - **Administrators Group** — Full Control
   - **OPWeb_LG** — Modify
   - **Network Service** — Read & Execute
   - **IIS_WPG** (Worker Process Group) — Read

3. Navigate to the **C:\netpub\wwwroot\opweb\PublishedCharts** folder, right-click and choose **Properties**.

   Select the **Security** tab and add the following users and permissions:
   - **Users Group** — Read
   - **Administrators** — Full control
   - **OPWeb_LG** — Modify
   - **Network Service** — Read & Execute

4. Navigate to the **C:\netpub\wwwroot\opweb\SourceCharts** folder, right-click and choose **Properties**.

   Select the **Security** tab and add the following users and permissions:

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- **Administrators** — Full control
- **OPWeb_LG** — Modify
- **Network Service** — Read & Execute

5. Navigate to the **C:\netpub\wwwroot\opweb\ArchivedCharts** folder, right-click and choose **Properties**.

   Select the **Security** tab and add the following users and permissions:

   - **Administrators** — Full control
   - **OPWeb_LG** — Modify
   - **Network Service** — Read & Execute

Configuring IIS

IIS (Internet Information Server) is a Microsoft® Windows® application that allows you to set up a Web site and control and manage it remotely through the Internet, assuming you have the necessary privileges and a Web browser.

Note: *See the appropriate section for your particular server version*

Configuring IIS for 2003 Server

1. Start Internet Information Services.
2. Expand the **(local computer)** entry, **Web Sites**, and **Default Web Site**.
3. Right-click **Opweb** and select **Properties**.
4. Select the **Read** check box and assign **Scripts and Executables** on **Execute Permissions**.
5. Select the **Directory Security** tab and select **Edit** for **Authentication and Access control**.

   The *Authentication Methods* dialog opens.
6. Clear the **Enable Anonymous access** check box.
7. Verify the **Integrated Windows authentication** check box is selected.
8. Click **OK** to close the *Authentication Methods* dialog.
9. Click **OK** again to close the *Properties* dialog.
10. Right-click **PublishedCharts** and select **Properties**.

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11. Select the **Read** check box and assign **Scripts and Executables** on **Execute Permissions**.
12. Select the **Directory Security** tab and select **Edit** for **Authentication** and **Access control**.

    The *Authentication Methods* dialog opens.
13. Select the **Enable Anonymous access** check box. Verify that the account is the **IUSR** account.
14. Verify the **Integrated Windows authentication** check box is selected.
15. Click **OK** to close the *Authentication Methods* dialog.
16. Select the **HTTP Headers** tab and select **MIME Types.**
17. In the MIME Types dialog box, Click **New**.
18. For the Extension and MIME type, enter **.ocp.**
19. To close the *MIME Type* dialog, click **OK** twice.
20. To close the *Properties* dialog, click **OK.**
21. Right-click **SourceCharts** and select **Properties**.
22. Select the **Read** check box and assign **Scripts and Executables** on **Execute Permissions**.
23. Select the **Directory Security** tab, and then select **Edit** for **Authentication** and **Access control**.
24. Verify the **Integrated Windows authentication** check box is selected.
25. Clear the **Enable Anonymous access** check box.
26. To close the *Authentication Methods* dialog. click **OK**
27. To close the *Properties* dialog, click **OK** again.
28. Right-click **Archived Charts** and select **Properties**.
29. Select the **Directory Security** tab, and then select **Edit** for **Authentication** and **Access control**.
30. Select the **Directory Security** tab, and then select **Edit** for **Anonymous access** and **authentication control**.

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The *Authentication Methods* dialog opens.

31. Clear the **Enable Anonymous access** check box, and then click **OK** to close the *Authentication Methods* dialog.
32. Verify the **Integrated Windows authentication** check box is selected, and then click **OK** again to close the *Properties* dialog.
33. Select the **Web Service Extensions** in the IIS Window.
34. Select **All Unknown ISAPI Extensions** and click **Allow**.

Note: *If you choose to enter each Web service extension individually, you will need to enter the remoteserver.dll and each chartname.dll by clicking* ***Add a new Web service extension****.*

35. Close the IIS Manger.

Configuring IIS for 2008 Server

1. Start Internet Information Services.
2. Expand the **(local computer)** entry, **Web Sites**, and **Default Web Site**.
3. Double-click **Opweb**.
4. Double-click **Handler Mappings** and click **Add Script Map.**

   The *Add Script Map* dialog opens.

5. Add the following script map information for **remote server.dll** and each Echart.dll.
   - Request path: ***.dll**
   - Executable: **C:\inetpub\wwwroot\opweb\remoteserver.dll**
   - Name: **OrgPublisher Web Administration**

   - Request path: ***.dll**
   - Executable:**C:\inetpub\wwwroot\opweb\PublishedCharts\ChartName.dll**
   - Name: **OrgPublisher Org Chart**

6. Click **Request Restrictions**, and then click the **Access** tab.

   Specify the access required by the handler to **Script**.

7. Click **OK** twice, and then click **Yes** to the message; **Do you want to allow this ISAPI extension**.

   The *Add Script Mapping* dialog closes.

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8. Double-click **Opweb**.
9. Double-click **Mime Types** and click **Add**.

   The *Add MIME Type* dialog opens.

10. Add the following MIME Type
    - File name extension: **.ocp**
    - *MIME type:* ***application/orgpublisher***
11. Click ***OK*** to close the *Add Mime Type dialog box.*
12. Double-click the **PublishedCharts** folder and double-click **Authentication.**
13. Highlight **Anonymous Authentication** and change the status to **Enabled**.
14. Close the *IIS Manger*.

Choosing DCOM Settings

DCOM (Microsoft® Distributed Component Object Model) is a language independent architecture that supports communication among objects on different computers—on a LAN, a WAN, or the Internet.

1. To load the application into DCOM, start OrgPublisher from the server where it is installed, and then close OrgPublisher.
2. On the **Task Bar**, click the **Start** button and select **Run**.

   Type **DCOMCNFG** in the **Open** field and click **OK**.

   If you receive a *CLSID Warning* message, click **Yes**

   The Microsoft® Windows® 2003 and 2008 COM Properties dialog opens.

Note: *Microsoft® Windows® 2003 and 2008 DCOM settings are the same.*

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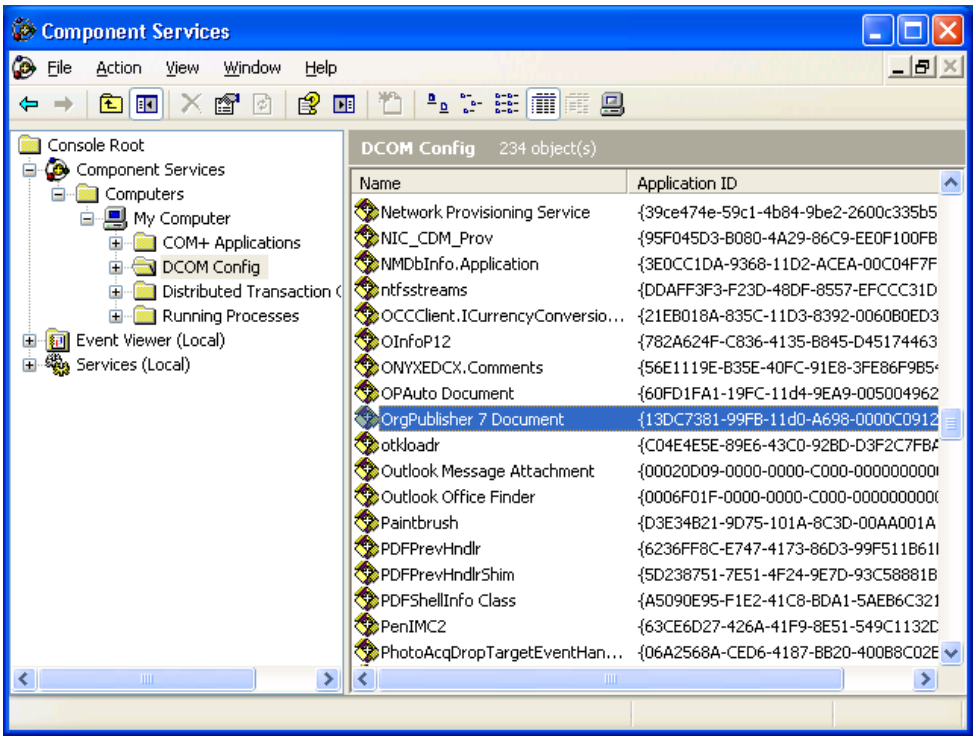

Figure 18

3. In the Name column, select **OrgPublisher (X) Document**; right-click and select **Properties**.

   The *OrgPublisher 9 Document Properties* dialog opens.

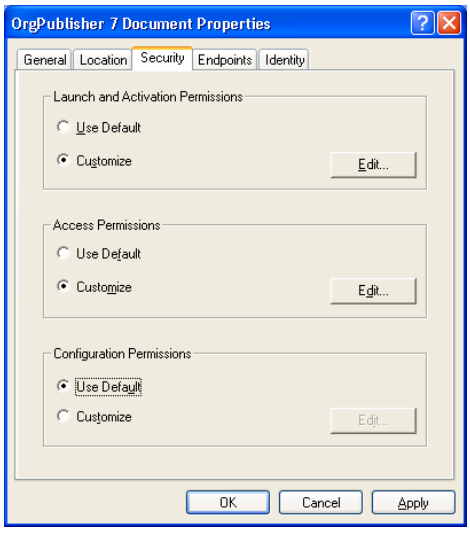

Figure 19

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4. Select the **Security** tab to set the access and launch permissions for the application.

5. In the **Launch and Activation Permissions** section select **Customize** and click the associated **Edit** button.

Note: *Make sure the users and groups are from the Web Server.*

6. Add the following **Users & Groups** - Check **Local Launch Permissions** for each of the following:
   - Administrators Group
   - Interactive Group
   - IUSR Account
   - IWAM Account
   - Network Group
   - Network Service Group
   - OPWeb_LG Group
   - System Group

Note: *For Windows® 2003 and 2008 Server, the **OPWeb LG** Group must have all four items checked; **Local Launch**, **Remote Launch**, **Local Activation** and **Remote Activation***

7. Repeat Steps 4. and 6. For the **Access Permissions.**

NOTE: *The Configuration Permissions do not require any customized settings.*

Test OrgPublisher Web Administration

In the browser's address bar, type the URL for OrgPublisher (for example, **http://**<*servername*>**/OPWEB/OPADMIN.HTM**, where <*servername*> is the name of the server where OrgPublisher is installed).

OrgPublisher Web Administration should open. If not, review the installation and permission settings. You may also need to contact your Web administrator.

Publishing an EChart thru Web Administration

When publishing ECharts thru Web Administration, you must select the Publishing Wizard Advanced Mode option.

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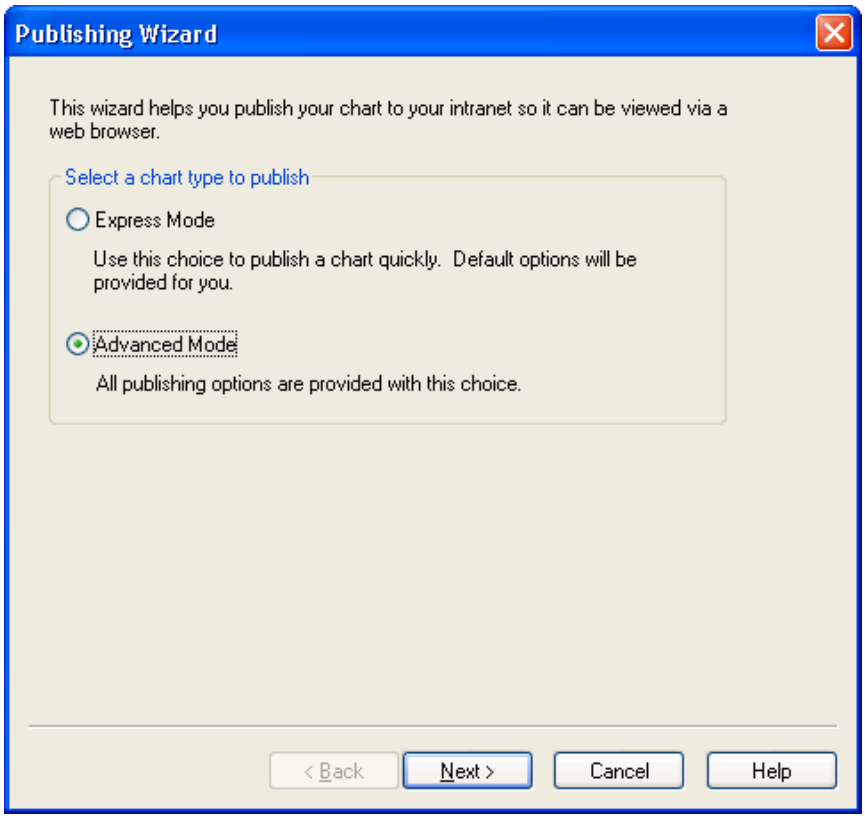
Publishing Wizard
This wizard helps you publish your chart to your intranet so it can be viewed via a web browser.
Select a chart type to publish
Express Mode
Use this choice to publish a chart quickly. Default options will be provided for you.
Advanced Mode
All publishing options are provided with this choice.
< Back
Next >
Cancel
Help

Figure 20

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Note: *When you publish ECharts through Web Administration, you will be prompted for the URL of the virtual directory where the* ***PublishedChart*** *folder resides.*

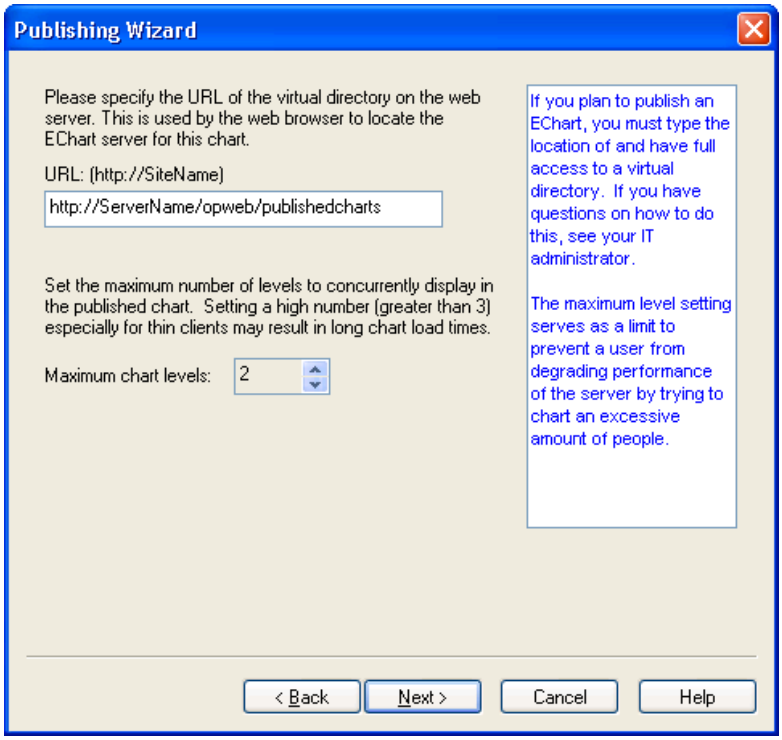
Publishing Wizard
Please specify the URL of the virtual directory on the web server. This is used by the web browser to locate the EChart server for this chart.
URL: (http://SiteName)
http://ServerName/opweb/publishedcharts
Set the maximum number of levels to concurrently display in the published chart. Setting a high number (greater than 3) especially for thin clients may result in long chart load times.
Maximum chart levels:
2
If you plan to publish an EChart, you must type the location of and have full access to a virtual directory. If you have questions on how to do this, see your IT administrator.
The maximum level setting serves as a limit to prevent a user from degrading performance of the server by trying to chart an excessive amount of people.
< Back
Next >
Cancel
Help

Figure 21

Note: *For complete instructions on publishing charts in Web Administration, see the Online Help file topic* ***Publishing a Chart Using Web Administration***.

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OrgPublisher 9 PluginX Implementation Guide

VERSION 9

aquire OrgPublisher

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OrgPublisher PluginX Browser Specifications **Error! Bookmark not defined.**
PluginX Implementation on Secured Workstations....6
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OrgPublisher PluginX Introduction

The purpose of this document is to provide the implementation information you need if you chose OrgPublisher's PluginX as one of your publishing options.

For implementation information for the OrgPublisher application or information about additional publishing options, refer http://www.aquire.com/support/

The PluginX option provides full user functionality and chart password security.

Other publishing options include:

- **Graphic** – (.JPG or .GIF) for importing to PowerPoint or other applications.
- **HTML** or **HTML** with drill up/drill down - for viewing on Non-Windows platforms such as Mac or UNIX.
- **PDF** publishes a chart to PDF document.
- **EChart Rich Client** – for performance enhancement of large charts. EChart allows security based on several kinds of authentication, field level security and hierarchical security.

  EChart Rich Client requires the OrgPublisher PluginX component.
- **EChart Thin Client** - provides functionality without a plug-in.

For more information, please contact Aquire at http://www.aquire.com/.

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Architecture Overview

OrgPublisher PluginX is required for interactive org charts.

OrgPublisher's PluginX uses Microsoft's ActiveX technology to display the org chart in a browser. The PluginX is a single file called **OrgPubX.ocx**.

Note: *OrgPlan also uses an ActiveX control. OrgPlan is discussed later in the document.*

The PluginX file is packaged into a signed CABINET file, also referred to as a CAB file. The CAB file is designed to automatically download the first time the end user views the chart. It installs **OrgPubX.ocx** into the windows system directory and registers itself in the computer's registry. Once installed and registered, org charts can be viewed in Internet Explorer.

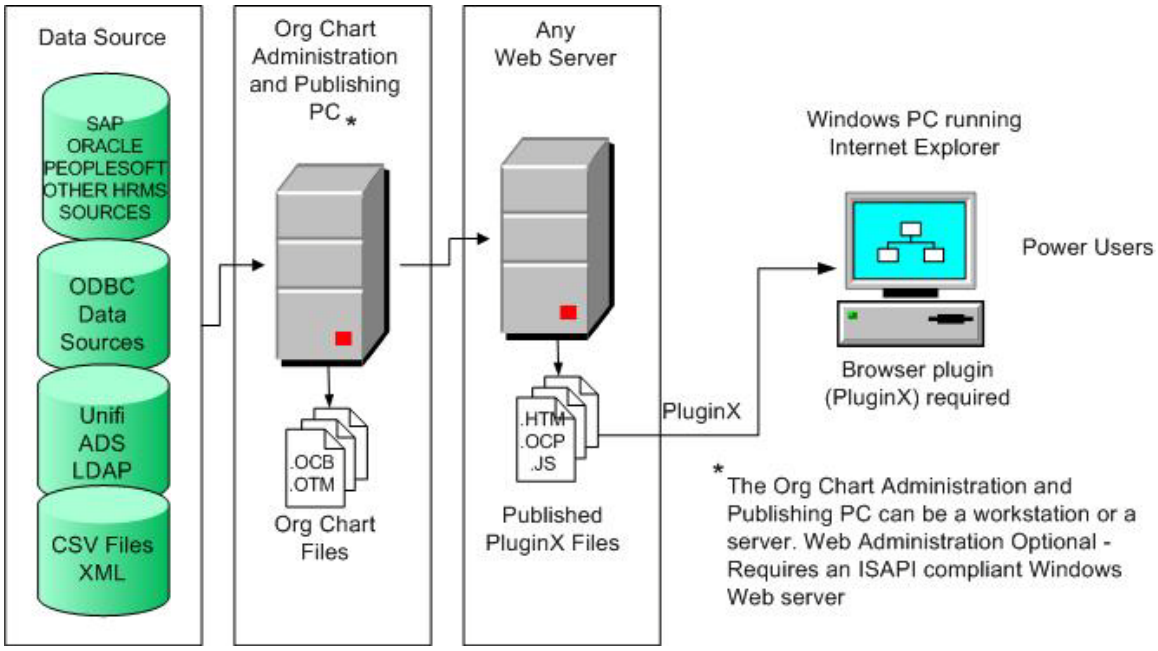

Figure 1

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Publishing PluginX

When a chart is published using the PluginX option, the following files are produced;

- JS file
- CFG file
- XML file
- OCP file – This file contains the chart data and formatting information.
- HTM file

  The HTM file contains code that is designed to check for several things.

  - It checks the browser type, Internet Explorer

    Note: *For Internet Explorer implementation, continue.*

  - It calls the JS file and checks the codebase statement. The codebase statement looks like the following.

```
document.write('codebase="http://www.aquire.com/codebase91/OrgPubX.cab#Version=9,1,2602,1"');
```

  - If the PluginX is not registered, then a new CAB file is downloaded using the codebase URL.
  - If the PluginX is registered, then the codebase function compares the version number that is registered with the version number in the codebase statement.
  - If the codebase statement version number is greater than the registered PluginX, then a new CAB file is downloaded using the codebase URL.
  - If the codebase statement is the same or less than the registered PluginX, then the chart is loaded using the existing, registered PluginX.

Alternate CAB File Location

The default CAB file URL goes to Aquire's Web site. However, if desired, the CAB file can be downloaded from:

http://www.aquire.com/codebase91/OrgPubX.cab#Version=9,1,2602,1;

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and deployed from a server within your organization. The codebase statement in the published JS file must then be modified to point to the internal location you deploy it to, as shown in the example.

```
document.write('="http://www.aquire.com/codebase91/OrgPubX.cab#Version=9,1,2602,1");
```

Each time you publish as PluginX, a new version of the:

- OCP (data and formatting)
- HTM
- JS

files are produced.

To preserve changes made to the HTM file, clear the **Overwrite existing HTML and JS file** option in the publishing definition. Clearing the check box is done during creation of a new publishing definition or when updating an existing publishing definition. See the following figure.

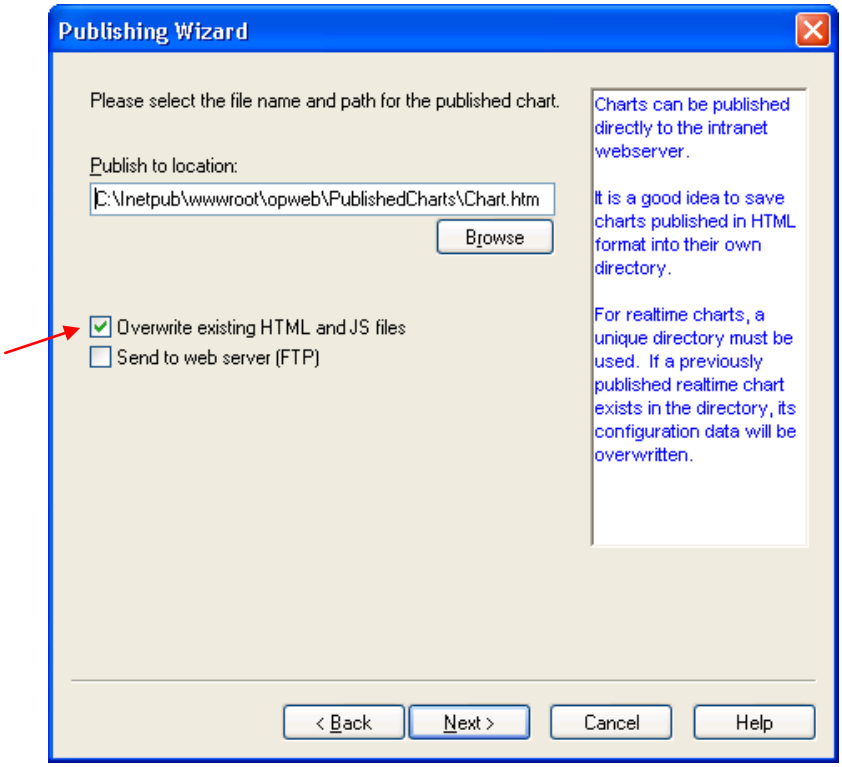
Publishing Wizard
Please select the file name and path for the published chart.
Publish to location:
C:\Inetpub\wwwroot\opweb\PublishedCharts\Chart.htm
Browse
Overwrite existing HTML and JS files
Send to web server (FTP)
Charts can be published directly to the intranet webserver.
It is a good idea to save charts published in HTML format into their own directory.
For realtime charts, a unique directory must be used. If a previously published realtime chart exists in the directory, its configuration data will be overwritten.
< Back
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Figure 2

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OrgPublisher PluginX Browser Specification

- Pentium® PC compatible or greater
- Microsoft Windows® XP, or Windows® Vista™ operating system
- 512 MB of RAM
- 60 MB available hard disk space
- Microsoft® Internet Explorer 6 and later for all versions of Windows® mentioned above

PluginX Implementation on Secured Workstations

The PluginX needs to be registered in order for a chart to load. When an ActiveX control is registered for the first time, certain keys in the registry in **HKEY_CLASSES_ROOT** are written.

Normal users (non Admin/Power Users) are no longer allowed to write to **HKEY_CLASSES_ROOT** unless they have been given permission to do so. Users wishing to write to **HKEY_CLASSES_ROOT** must be a member of the local Administrators or Power Users group.

Note: *This level of permissions is too broad for many organizations.*

Organizations wishing to "lock down" the desktop, and thus control what is installed on a workstation, must remove this level of permissions. This prevents the ActiveX control from registering.

PluginX Registration for Non-admin users

Non-admin users are permitted to write to **HKEY_CURRENT_USER\Software\Classes**. In this new registry implementation, ActiveX components continue to use **HKEY_CLASSES_ROOT** for machine-wide settings but also allows per-user configuration of Class IDs (CLSIDs) to provide greater security and flexibility. Under Windows XP, ActiveX controls first consults **HKEY_CURRENT_USER\Software\Classes** prior to looking under **HKEY_CLASSES_ROOT**.

Manual PluginX Implementation

There are several ways to manually install the PluginX.

- Administrators

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- Have an administrator login and open an org chart with a browser. This downloads the CAB file and installs the PluginX. Once loaded, it stays loaded for all users of that computer.
- Run an automated process that "pushes" (copies) the PluginX file **OrgPubX.ocx** to the end user's computer (in a location they have access to) and then registers it.
  - Registration is accomplished using the command **REGSVR32.EXE** from a command prompt, using the syntax:

    `Regsvr32 OrgPubX.ocx`

- Non-admin Users
  - Method 1: Your IT administrators can push out and register the control using the company standard procedure.
  - Method 2: We have MSI scripts (Microsoft Installer packages) available to assist with pushing out the PluginX (orgpubX.ocx) to locked down workstations. If you require a script to automate the installation of the PluginX, please contact support@aquire.com with this request.

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PluginX and ECharts

EChart publishing is designed to publish charts with a large number of records and/or custom fields, or when you would like to publish secure charts based on authentication methods (NT or custom methods using custom fields). ECharts are published in two ways: EChart Rich Client uses the OrgPublisher PluginX discussed in this document.

EChart Thin Client requires no end user browser component add-on.

For implementation information for ECharts, see
http://www.aquire.com/support/

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ECharts on Windows® Server 2003 and Windows® Server 2008

When publishing ECharts to Windows® Server 2003 or Windows® Server 2008 some additional settings are required.

For these settings, see the *OrgPublisher 9 Installation Guide* at http://www.aquire.com/support/

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OrgPublisher Real-time Implementation Guide

VERSION 9

aquire OrgPublisher

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OrgPublisher Real-time Introduction

The purpose of this document is to provide an overview of OrgPublisher's Real-time publishing option, and to provide the information needed to assist you in determining if this functionality is right for your facility.

- Real-time charts provide users with immediate access to up-to-date information.
- Real-time publishing is an option when publishing an EChart, either Rich or Thin Client, that has been created using any ODBC/OLE DB compliant data source.

Choosing Real-time Over Non-Real-time Charts

OrgPublisher provides users with access to information using real-time and non-real-time charting options. Both methods should be carefully evaluated before making a final decision on the proper charting method for your company.

Real-time charting provides users with live access to data. Live access increases traffic and resource utilization on the management system storing the data which may impact its overall performance.

Non-real-time charting extracts information at a scheduled time interval (typically nightly). This eliminates performance concerns on management systems while providing time dated information from the previous day.

Additionally, real-time charting does not offer the following features available in the non-real-time charts:

- summary/analytic reporting
- compound searching
- group-based searching
- some security options

Note: *A hybrid approach can be taken which involves the creation of a real-time and a non-real-time chart. Standard users are given typical access to non-real-time charts and designated users requiring live access are given access to real-time charts.*

The following points will help guide you through the evaluation process:

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Real-time may be an option if:

- Your IT department has approved the use of real-time charts.
- Your system can minimize performance decreases when your end users access real-time charts.
- The performance for your end user does not decrease as the chart size increases.
- Your data source is an ODBC connection from an Oracle® or SQL database.
- You publish your chart infrequently or over long scheduled intervals.

Real-time should *not* be considered if:

- Your chart is built from multiple data sources
- Your HR system does not have the capacity to process the number (possibly hundreds) of real-time inquiries.
- Your chart contains sensitive data fields intended only for select managers.
- You need to conduct complex searches in order to create groups.
- You need access to summary reporting.
- You publish at frequent intervals, such as nightly.
- End users need the ability to save their own groups.

For more information, please contact Aquire at http://www.aquire.com/.

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Architecture Overview

Real-time charts provide users with immediate access to up-to-date information. Dynamic organizational charts are generated using real-time access for Microsoft® SQL, Oracle®, or Microsoft® Access data source, and then published in EChart format.

Real-time Chart Publishing Requirements

Requirements for publishing real-time charts include:

- Microsoft® Data Access Components (MDAC) 2.6 or higher.
- ASP.NET support on the Web server.
- EChart that has been created using an ODBC connection.
  - ECharts use a Microsoft® Internet Explorer browser.
  - ECharts require Microsoft® IIS or ISAPI-compliant server.
- Chart must be published to a virtual directory.

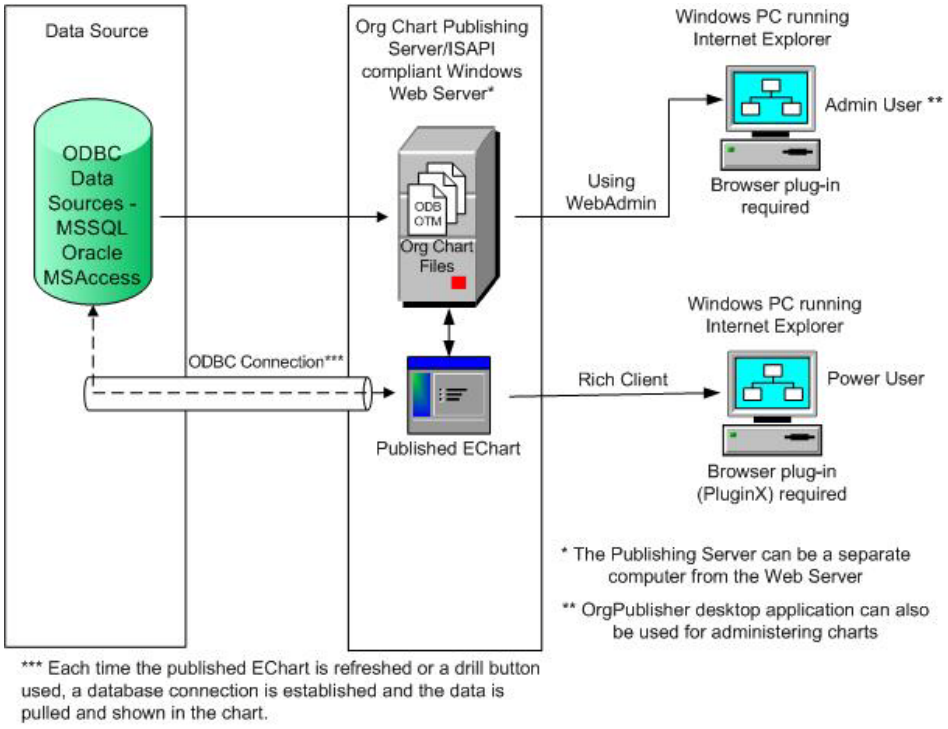
Data Source
ODBC Data Sources - MSSQL Oracle MSAccess
Org Chart Publishing Server/ISAPI compliant Windows Web Server*
ODB OTM
Org Chart Files
Published EChart
ODBC Connection***
Windows PC running Internet Explorer
Admin User **
Using WebAdmin
Browser plug-in required
Windows PC running Internet Explorer
Rich Client
Power User
Browser plug-in (PluginX) required
* The Publishing Server can be a separate computer from the Web Server
** OrgPublisher desktop application can also be used for administering charts
*** Each time the published EChart is refreshed or a drill button used, a database connection is established and the data is pulled and shown in the chart.

Figure 1

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Configuring the Server

In order to publish real-time charts, you must follow your server configuration steps for EChart or Web Administration setup. The OrgPublisher Web Administration Server configuration will work for real-time charts, but you must follow the *Configuring IIS to Run .NET Framework* procedure below.

Configuring IIS to Run .NET Framework

If you are publishing using the OrgPublisher Web Administration Server, you must configure IIS to run .NET Framework. On the server where real-time charts will be published, access a command line and type:

```
CD\WINDOWS\Microsoft.NET\Framework\v1.1.4322
C:\WINDOWS\Microsoft.NET\Framework\v1.1.4322> aspnet_regiis.exe -i
```

The system responds with:

Start installing ASP.NET (1.1.4322.0)

Finished installing ASP.NET (1.1.4322.0)

IIS Configuration on Windows® 2003 and Windows® 2008 Servers

When using the Microsoft Windows 2003 Server with OrgPublisher Web Administration, ASP.NET V1.1.4322 must be enabled as an extension. This is in addition to the EChart or Web Administration setup configuration.

Note: *If you are publishing real-time charts using the OrgPublisher Web Administration Server, you must first (one time only) open OrgPublisher on the server outside of Web Administration. Using the Publishing Wizard, create the Connection String in the publishing definition, create your ODB chart, and save the chart to the* ***Sourcecharts*** *folder.*

When using Web Administration from your desktop, OrgPublisher looks only at your desktop for the data source name. In order to successfully publish real-time charts in Web Administration, OrgPublisher must, however, get the data source name from the server.

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Publishing Real-time Charts

Real-time publishing is an option when publishing a Rich Client EChart that has been created using an ODBC connection.

Only one real-time chart can be supported in the PublishedCharts folder at a time. If you plan to concurrently publish more than one real-time chart, place them in separate folders.

Note: *Preconfigured connectors may contain some limitations. There is more than one way to extract data from your database. Reporting tools that often come with major ERP systems can extract a comma-delimited file that can be configured to build a chart. If you need assistance in configuring your data extract, please contact the Product Support team at http://www.aquire.com/support/*

This option requires Microsoft® Data Access Components (MDAC) 2.6 or higher, ASP.NET support on the Web server, and must be published to a virtual directory.

You can also configure real-time connections for a Unifi chart. See the OrgPublisher online Help file topic **Real-time Connection Configuration** for more information.

Note: *The EChart option supports Microsoft® Internet Explorer or, and requires a Microsoft® IIS or ISAPI-compliant server.*

Real-time charts must be secured via your IIS, not through the Publishing Wizard. The security dialog is not available when you publish a real-time chart.

1. Create your chart in the *New Chart Wizard,* first selecting Organizational chart, and then using the **ODBC database** option. Follow the *New Chart Wizard* dialog prompts to select the data source.
2. After the new chart has been created and opened in OrgPublisher, click the **Publish** button

in the toolbar.

   If this is the first time you are publishing a chart, the wizard opens to the first dialog which gives you a brief overview of the Publishing Wizard.

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Select the **Advance Mode** option. Click **Next**, and then click **Next** again**.**

3. Follow the *Publishing Wizard* dialog prompts, verifying that you published as an EChart and used a virtual directory, until you reach the *Publishing Wizard Real-time Data* dialog (Figure 2).

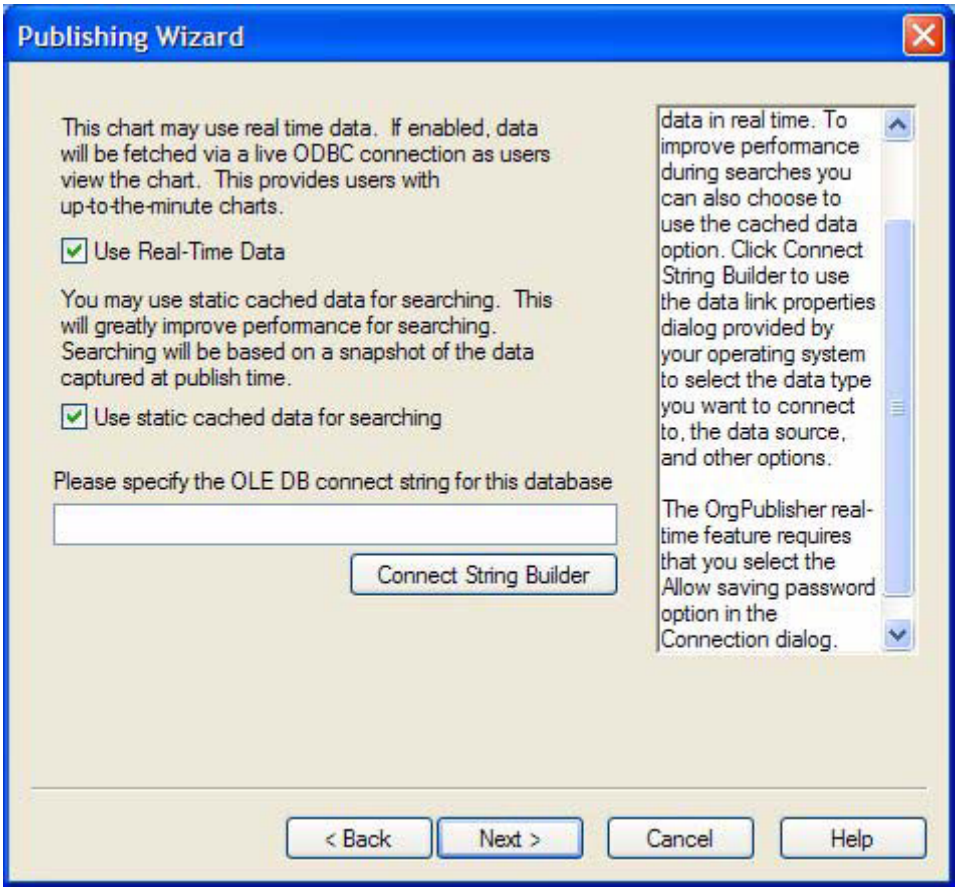
Publishing Wizard
This chart may use real time data. If enabled, data will be fetched via a live ODBC connection as users view the chart. This provides users with up-to-the-minute charts.
Use Real-Time Data
You may use static cached data for searching. This will greatly improve performance for searching. Searching will be based on a snapshot of the data captured at publish time.
Use static cached data for searching
Please specify the OLE DB connect string for this database
Connect String Builder
data in real time. To improve performance during searches you can also choose to use the cached data option. Click Connect String Builder to use the data link properties dialog provided by your operating system to select the data type you want to connect to, the data source, and other options.
The OrgPublisher real-time feature requires that you select the Allow saving password option in the Connection dialog.
< Back
Next >
Cancel
Help

Figure 2

4. Select the **Use Real-Time Data** check box.

5. If you want to improve searching performance, you can select the **Use static cached data for searching** check box. This performs all searches using a “snapshot" of the data as of publishing time only. If you do not select this option, end users will be able to search using real-time data.

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6. Type the **OLE DB connect string** for the database.
7. Click **Next** and proceed to Step 9.

   -or-

   If you need help building the connect string, click **Connect String Builder**.

   The Data Link Properties dialog opens at the **Provider** tab. Follow the Microsoft operating system prompts to select a data provider, build a connection string, choose a data source, and test the connection.

Note: *If you publish using Oracle®, you must use an OLE driver for Oracle. Select the **Microsoft® OLE DB Provider for Oracle®** drive or, if available, the **Oracle® OLE** device.*

8. Before you complete the *Data Link Properties* dialog, select the **Connection** tab.

   You ***MUST*** select the **Allow saving password** check box. This allows the password to be saved in the connection string in order to open the chart.

   Click **OK** to close the dialog and return to the *Publishing Wizard*.

9. Complete the *Publishing Wizard*.

Note: *The **PublishedCharts** folder will contain the usual EChart files. In addition, it will store **OrgPubRealTime.dbconfig** (contains the encrypted connection string data and column names) as well as **OrgPubRealTime.asmx** (directs real-time charts to use the EChart DLL).*

Real-time publishing is not available when creating charts from multiple data sources.

OrgPublisher 9 provides Real-time publishing features. For information on the additional features and instructions for using them, see the Online Help topics:

- *Publishing real-time Charts*
- *Creating an Org Chart from a Unifi Style*
- *Configure Real-time Connections*

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OrgPublisher 9 EChart and PluginX Security Guide

VERSION 9

aquire OrgPublisher™

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Introduction

The purpose of this document is to review each of the different levels of security for a published chart, including the data within a published chart.

It does not cover external security configuration of the network file structures or external resources such as servers. It also does not cover Single Sign On. These topics are beyond the scope of this document. For more information on implementing this type of solution, please contact support@aquire.com.

OrgPublisher can set different levels of security for a published chart, depending on the publishing format you use. Also, depending on the version of OrgPublisher, there are several levels of security you can use with org chart data. These levels are:

- Basic chart encryption with password protection
- Authentication using either Windows NT® operating system authentication or manual authentication using specified user IDs and passwords
- Custom field level security based on group membership
- Style level security based on group membership

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Securing a PluginX Chart

OrgPublisher contains a security feature for charts published in the PluginX format; this feature encrypts the chart and sets a password. When end users access an encrypted chart, they must enter the password before the chart opens.

There are two levels of encryption, 40 bit and 128 bit. OrgPublisher uses **40 bit encryption** by default. To determine which encryption pack is installed on your machine, start Internet Explorer and select **About Internet Explorer** from the **Help** menu.

1. Follow the dialogs in the *Publishing Wizard*, selecting the **PluginX** publishing format.
2. When the wizard opens the *Password* dialog, select the **Password protect this chart** check box.

Publishing Wizard
You may password protect this chart. This will encrypt the data and the password will be required to view it.
Password protect this chart
Password Protection Options
Password:
40 bit encryption
128 bit encryption
Allow 'Remember my password' option in the PluginX
The chart may be password protected which will also encrypt the chart for security reasons.
< Back
Next >
Cancel
Help

Figure 1

Type the desired **Password**

-or-

If you want users to access the chart without typing the password each time they open it, select the **Allow 'Remember my password' option in the PluginX** check box.

NOTE: *If you select 128 bit encryption, users without the Microsoft High Encryption Pack installed on their machines cannot view the chart.*

3. Complete the *Publishing Wizard*.

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When OrgPublisher or Internet Explorer opens the encrypted chart, the *Enter Password* dialog opens. If you selected the **Remember my password** option when you published the chart, that check box appears in the dialog.

Figure 2

4. Type the correct **Password** and click **Unlock** to open the chart.

   -or-

   If you select **Remember my password**, you will not need to type the password each time; the chart will open in the same way an unprotected chart does.

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EChart — Org Chart Authentication

OrgPublisher contains an EChart security feature that provides security at the chart, custom field (for both Rich and Thin Clients) and style levels (for Rich Client only). For information on field level security, see EChart — Field Level (Role-based) Security Scenarios.

In order to secure ECharts, the OrgPublisher input file must contain a unique user ID custom field record. Additionally, if the manual entry of a password will be required, you must also keep the password information in a custom field record in the input file.

OrgPublisher uses the Microsoft Active Directory® operating system authentication to help secure a published chart. Authentication provides the knowledge of the location of each person in the chart, and OrgPublisher users must be charted in order to open a secured EChart.

The *Publishing Wizard* provides chart level security options; the *Custom Field Properties* dialog provides the field level security options.

The *List View*, *Profile View*, *Search View*, and *Search* dialog all reflect the same authentication level.

Commands, such as **Go to top of chart**, **Display Whole Chart**, and the drill-up/drill-down buttons, all recognize the "top of chart" as the user's supervisor box (exception: if the user's box is the starting box and drill up has been turned off, the user's Supervisor's box is not visible), and does not display chart information beyond that point.

Note: *EChart security works well only with an unbroken hierarchy. Orphans within a secured chart may cause unexpected results.*

There are four types of authentication.

- **Full Microsoft Active Directory® authentication** — the server automatically recognizes you by your Windows Domain user ID and password, and opens the OrgPublisher EChart at your box. The User ID is designated in the input file record and selected in the *Publishing Wizard* when activating this security type. If a user is dialing in and is not automatically recognized, OrgPublisher prompts for a user ID and password.

  NT authentication for EChart thin client always requires the manual entry of the user's password.
  You can specify the **Format of User ID field**:

  - **User ID only**
  - **Domain/User ID**
  - **Domain.company.com/User ID**

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OrgPublisher places the user in the chart at the starting point defined by the publishing definition. This option requires a custom field containing the Windows NT user ID.

- **System user ID/box Linkage** — the server grants access to the chart to any user ID on the user machine. ***This is not a secure setting*.** The chart opens at the user's box.

  This option requires a custom field containing the user ID of the computer.

  This option is not secure because it uses whatever ID is logged on to the computer. It can be a local computer account, which could be created by anyone with appropriate access to the computer.

- **Chart authentication** — the server prompts each user for a user ID and password in order to open the OrgPublisher EChart. The user IDs and passwords are contained or present in the input file record and selected in the *Publishing Wizard* when activating this security type.

  This method requires a custom field containing the value of the user ID, and another custom field containing a password value. This password can be randomly generated and fed into the chart data by an external program.

- **Reverse proxy** – The user ID is supplied in an HTTP header. When a user accesses the chart URL, a reverse proxy server intercepts the request and, through an authentication program/method, supplies the appropriate user ID as a variable in the HTTP header and sends it to the original destination.

  The EChart uses this variable value provided in the header to perform a lookup in a specified custom field containing the user IDs.

- **Private fields** (**Field level security**) — the server does not pass private field information into the OrgPublisher EChart for users not specified in the *Custom Field Properties* dialog **Security** option.

Note: *To prevent the circumvention of your user level security, you must restrict all users from accessing or transferring the* ***.ocs*** *file in the EChart publishing directory.*

In addition to chart security options, ECharts also control the starting point in the org chart. Options are:

- Top of chart
- Supervisor's box
- User's box
- A box specified by a particular custom field

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The **Allow users to drill up from starting box** check box allows users to navigate to levels above their box in the chart.

Clear the check box if you do *not* want users to navigate above their own chart level.

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Securing an EChart at the Custom Field Level

1. Verify that you have stored the appropriate custom field records in your input file.

2. To set field level security, from the Data menu, select **Custom Field Properties**

   -or-

   Click the button in the toolbar.

Note: *If you do not need field level security, proceed to Step 7.*

The *Custom Field Properties* dialog opens.

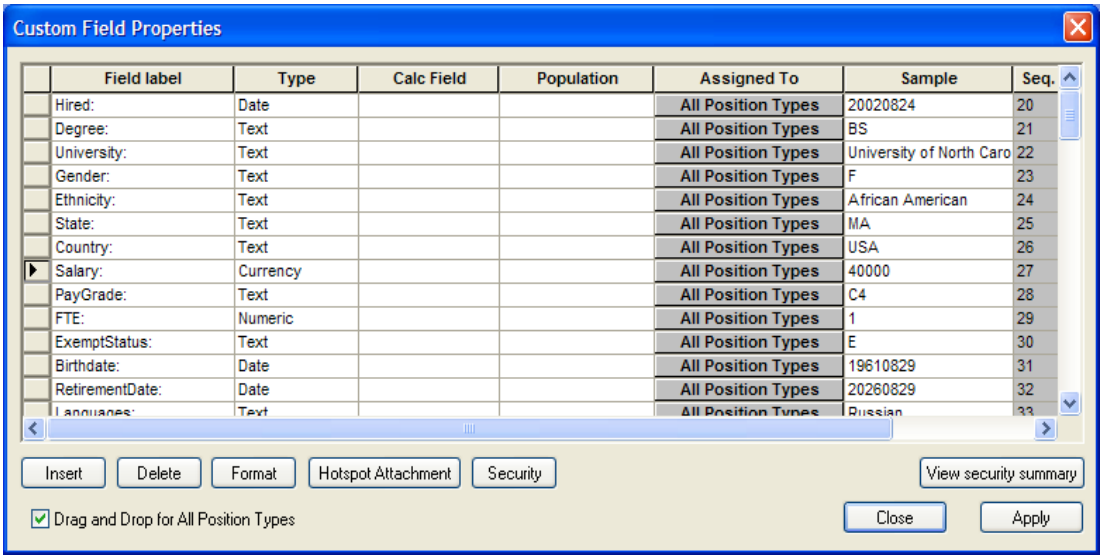
Custom Field Properties
Field label
Type
Calc Field
Population
Assigned To
Sample
Seq.
Hired: Date All Position Types 20020824 20
Degree: Text All Position Types BS 21
University: Text All Position Types University of North Caro 22
Gender: Text All Position Types F 23
Ethnicity: Text All Position Types African American 24
State: Text All Position Types MA 25
Country: Text All Position Types USA 26
Salary: Currency All Position Types 40000 27
PayGrade: Text All Position Types C4 28
FTE: Numeric All Position Types 1 29
ExemptStatus: Text All Position Types E 30
Birthdate: Date All Position Types 19610829 31
RetirementDate: Date All Position Types 20260829 32
Insert
Delete
Format
Hotspot Attachment
Security
View security summary
Drag and Drop for All Position Types
Close
Apply

Figure 3

3. Select a custom field (**Salary**) and click **Security**.

   The *Custom Field Security* dialog opens.

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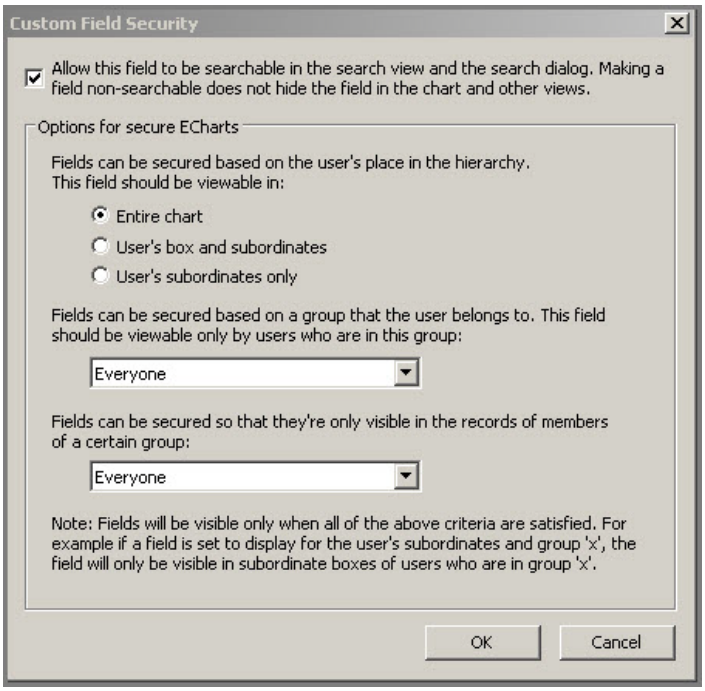
Custom Field Security
Allow this field to be searchable in the search view and the search dialog. Making a field non-searchable does not hide the field in the chart and other views.
Options for secure ECharts
Fields can be secured based on the user's place in the hierarchy.
This field should be viewable in:
Entire chart
User's box and subordinates
User's subordinates only
Fields can be secured based on a group that the user belongs to. This field should be viewable only by users who are in this group:
Everyone
Fields can be secured so that they're only visible in the records of members of a certain group:
Everyone
Note: Fields will be visible only when all of the above criteria are satisfied. For example if a field is set to display for the user's subordinates and group 'x', the field will only be visible in subordinate boxes of users who are in group 'x'.
OK
Cancel

Figure 4

4. Select the search options for the chart:

   If you want the chart users to be able to search for the custom field in the published chart, select the **Allow this field to be searchable** check box.

   -or-

   If you *do not* want the chart users to be able to search for the custom field in the published chart, clear the **Allow this field to be searchable** check box.

5. Select the radio button that best fits the user audience you want to access the field:
   - **Entire chart** — Select this radio button if you want the field displayed throughout the entire chart. This is the default option.
   - **User's box and subordinates** — Select this radio button if you want the field displayed only in the user's box and all boxes below it.
   - **User's subordinates only** — Select this radio button if you want the field displayed only in the boxes below the user's box.
6. From the drop-down box, select the group (if any) that you want to access the secured field. The default option is **Everyone**. Fields display in the chart when both the user audience and group criteria are satisfied.
7. Click **OK**.

   The *Custom Field Security* dialog closes.

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8. Click **Apply**, and then click **Close** to accept your security settings and close the *Custom Field Properties* dialog.
9. Open the *Publishing Wizard* by selecting **Publishing Wizard** from the **Tools** menu

   -or-

   Click the Publishing Wizard

   button in the toolbar.
10. Select the **Advance Mode** publishing option, and then follow the prompts in the wizard dialogs. When you reach the *Security* dialog, select a security level option.

    If you select to secure your chart, users must appear in a box in the chart in order to open the chart.

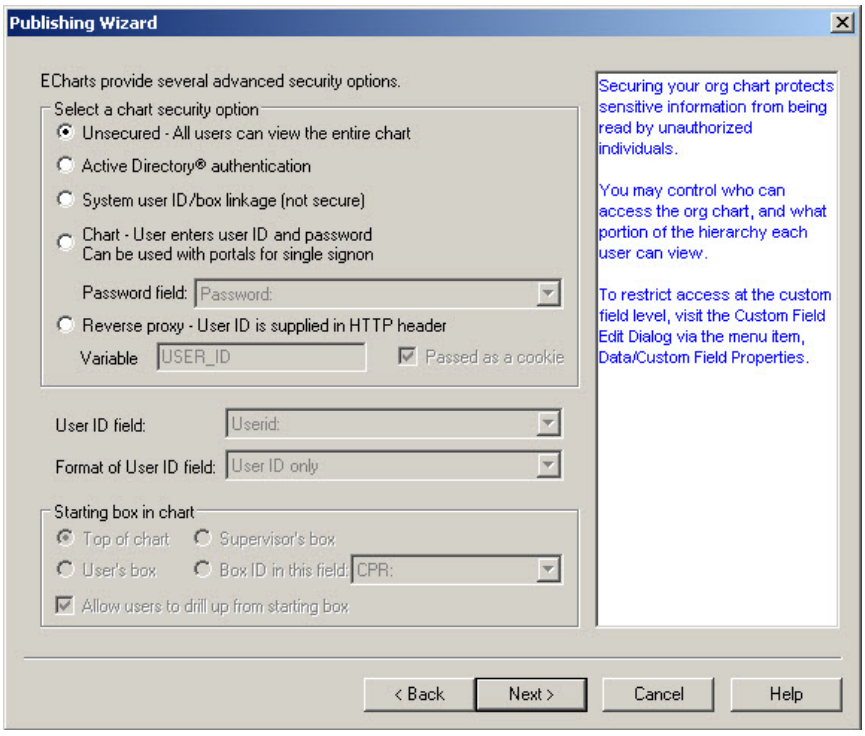
Publishing Wizard
EChart provides several advanced security options.
Select a chart security option
Unsecured - All users can view the entire chart
Active Directory® authentication
System user ID/box linkage (not secure)
Chart - User enters user ID and password
Can be used with portals for single signon
Password field: Password:
Reverse proxy - User ID is supplied in HTTP header
Variable USER_ID
Passed as a cookie
User ID field: Userid:
Format of User ID field: User ID only
Starting box in chart
Top of chart
Supervisor's box
User's box
Box ID in this field: CPR:
Allow users to drill up from starting box
Securing your org chart protects sensitive information from being read by unauthorized individuals.
You may control who can access the org chart, and what portion of the hierarchy each user can view.
To restrict access at the custom field level, visit the Custom Field Edit Dialog via the menu item, Data/Custom Field Properties.
< Back
Next >
Cancel
Help

Figure 5

There are five security options:

- **Unsecured** — Grants access to all users.
- **Microsoft Active Directory® operating system authentication** — Grants access to only those users who have Windows NT access and who are actually located in the chart.

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- **System user ID/box linkage (not secure)** — Grants access to any user ID on the user machine. This is not a secure setting. The chart opens at the user's box.
- **Chart** — Requires users to type an ID and password to open and view the chart.
- **Reverse Proxy** – The user ID is supplied in an HTTP header. When a user accesses the chart URL, a reverse proxy server intercepts the request and, through an authentication program/method, supplies the appropriate user ID as a variable in the HTTP header and sends it to the original destination. The EChart uses this variable value provided in the header to perform a lookup in a specified custom field containing the user IDs.

Note: *An alternate option allows the variable to be passed as a cookie.*

11. If you selected **Chart**, select the **Password field** containing the password information. This must be stored in a custom field record in the input file.
12. Select the **User ID field** that holds the unique user ID. This information must be stored in a custom field record in the input file.
13. In the **Starting box in chart** section, select the box you want OrgPublisher to display as top of chart.
    - **Top of chart** — Opens the chart at the original top of chart box, displaying all levels in the chart.
    - **Supervisor's box** — Opens the chart at the user's supervisor's box, displaying all levels from that point downward.
    - **Employee's own box** — Opens the chart at the user's box, displaying all levels from that point down.
    - **Box ID in this field** — Opens the chart at a top of chart box other than the previous options. This unique ID must be stored in a custom field record in the input file.
14. The **Allow users to drill up from starting box** check box allows users to navigate to levels above their box in the chart. Clear the check box if you do *not* want users to navigate above the starting box designated.
15. Complete the *Publishing Wizard*.

    When the published chart opens, it reflects the security options you selected here.

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Scenario Examples

Let's examine some scenarios based on the chart security options covered so far.

Since **Unsecured** and **System User ID/box linkage** do not represent secure options, and behave the same way upon entering the chart, we will concern ourselves with the **Microsoft Active Directory®** authentication and **Chart user ID and password**.

All data in the following sample chart is fictitious and not intended to represent an existing company.

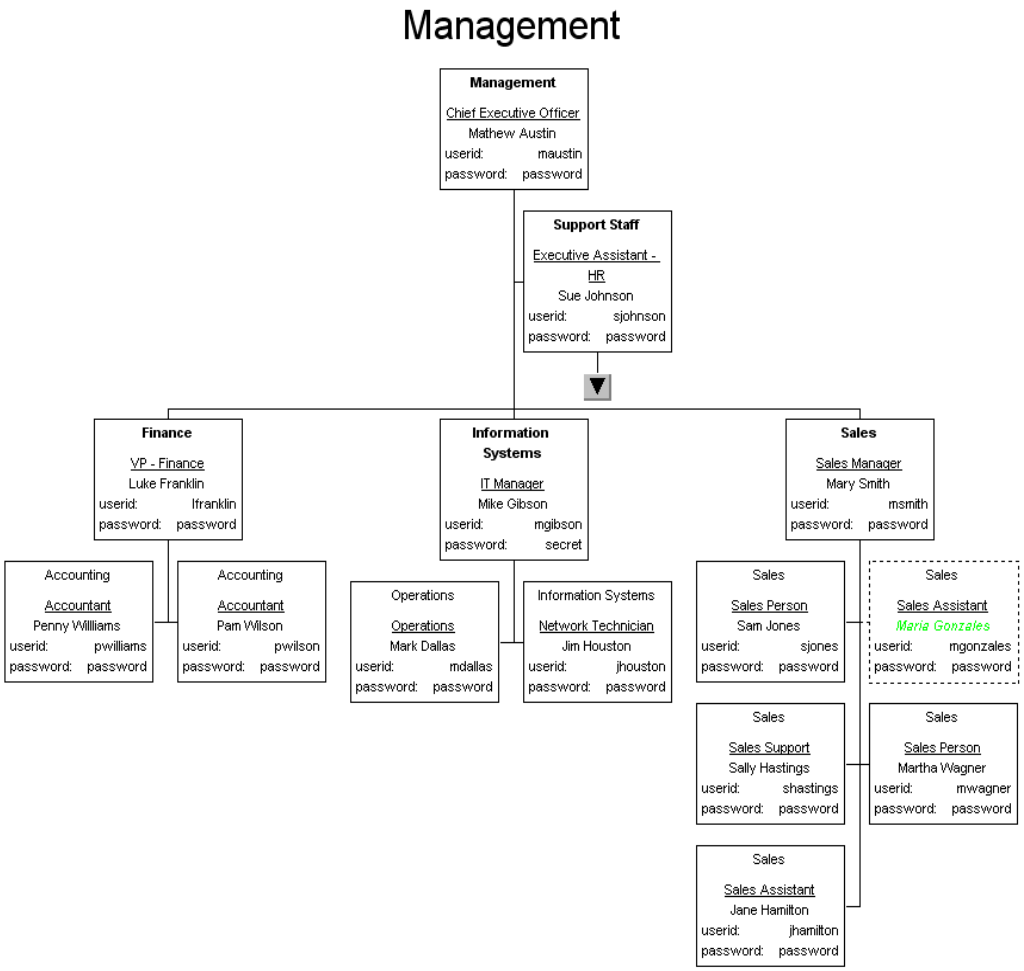

Figure 6

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Microsoft Active Directory® Authentication

The following dialog shows that we have selected Microsoft Active Directory® authentication. To use this method of authentication, the user IDs must exist in a custom field in the chart. The field we have chosen to contain the user ID is named **Userid**. We have also selected the **User ID only** format for the data in the custom field, and have elected not to allow drilling up from the starting box. Users can drill down (if there are multiple levels below the user). For the **Starting box in chart** option, we have chosen the **User's box** option.

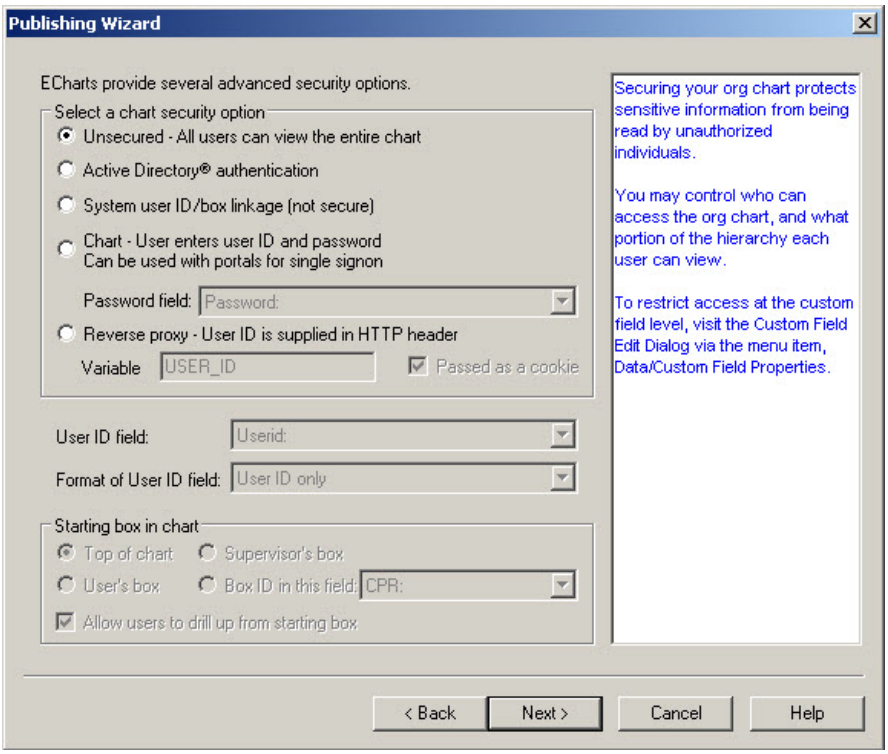
Publishing Wizard
ECharts provide several advanced security options.
Select a chart security option
Unsecured - All users can view the entire chart
Active Directory® authentication
System user ID/box linkage (not secure)
Chart - User enters user ID and password
Can be used with portals for single signon
Password field: Password:
Reverse proxy - User ID is supplied in HTTP header
Variable USER_ID
Passed as a cookie
User ID field: Userid:
Format of User ID field: User ID only
Starting box in chart
Top of chart
Supervisor's box
User's box
Box ID in this field: CPR:
Allow users to drill up from starting box
Securing your org chart protects sensitive information from being read by unauthorized individuals.
You may control who can access the org chart, and what portion of the hierarchy each user can view.
To restrict access at the custom field level, visit the Custom Field Edit Dialog via the menu item, Data/Custom Field Properties.
< Back
Next >
Cancel
Help

Figure 7

In this example, Mike Gibson is logged into his Windows Active Directory® Domain. When he accesses the chart, he enters the chart at his user's box, as shown in the following chart example.

There are no drill-up buttons, because we have cleared the option that allows users to drill-up. There are no drill-down buttons because Mike has only one level of reports. If there were multiple report levels, Mike Gibson could drill down to see them.

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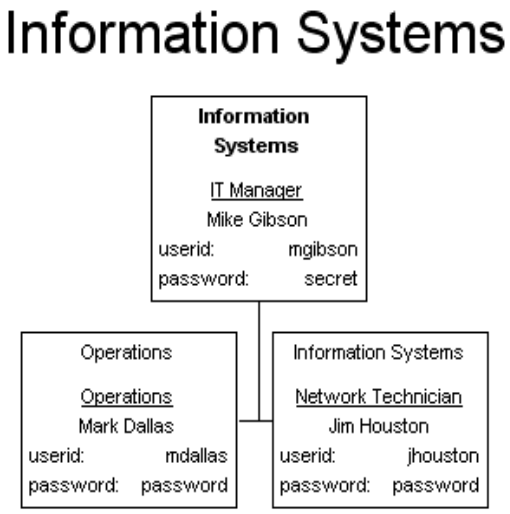

Figure 8

Now we choose the same publishing option, only this time we allow the user to drill up as seen in the following figure.

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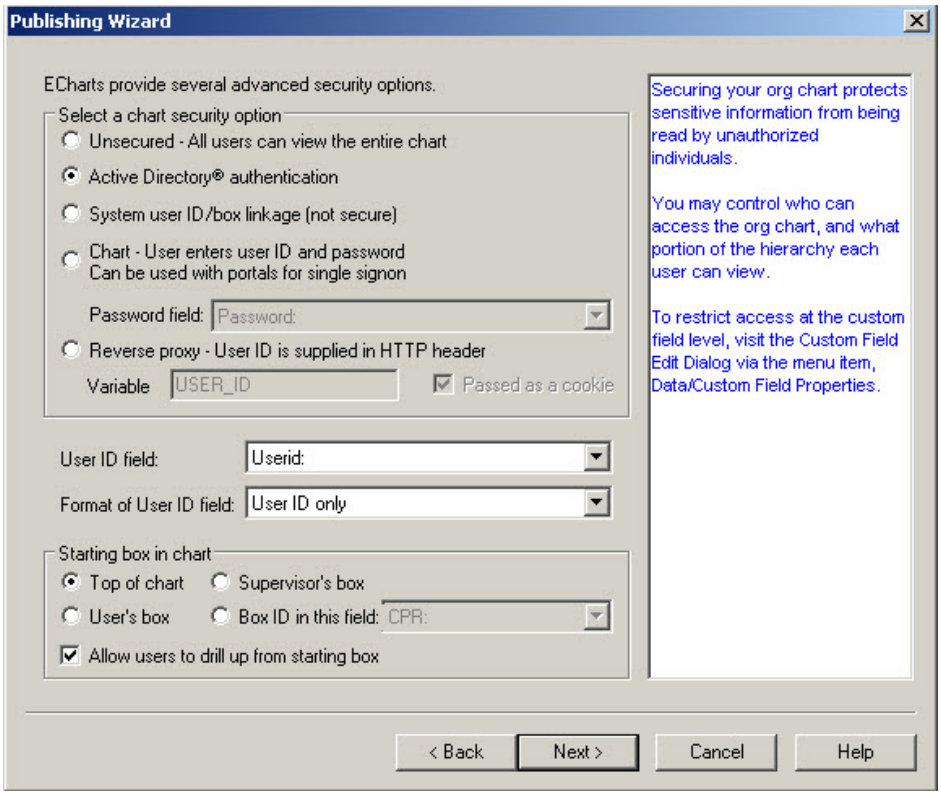
Publishing Wizard
ECharts provide several advanced security options.
Select a chart security option
Unsecured - All users can view the entire chart
Active Directory® authentication
System user ID/box linkage (not secure)
Chart - User enters user ID and password
Can be used with portals for single signon
Password field: Password:
Reverse proxy - User ID is supplied in HTTP header
Variable USER_ID
Passed as a cookie
User ID field: Userid:
Format of User ID field: User ID only
Starting box in chart
Top of chart
Supervisor's box
User's box
Box ID in this field: CPR:
Allow users to drill up from starting box
Securing your org chart protects sensitive information from being read by unauthorized individuals.
You may control who can access the org chart, and what portion of the hierarchy each user can view.
To restrict access at the custom field level, visit the Custom Field Edit Dialog via the menu item, Data/Custom Field Properties.
< Back
Next >
Cancel
Help

Figure 9

Mike still enters the chart at the same point, but this time there is a drill-up button, allowing him to navigate up the tree to view other parts of the chart, as shown in the following figure.

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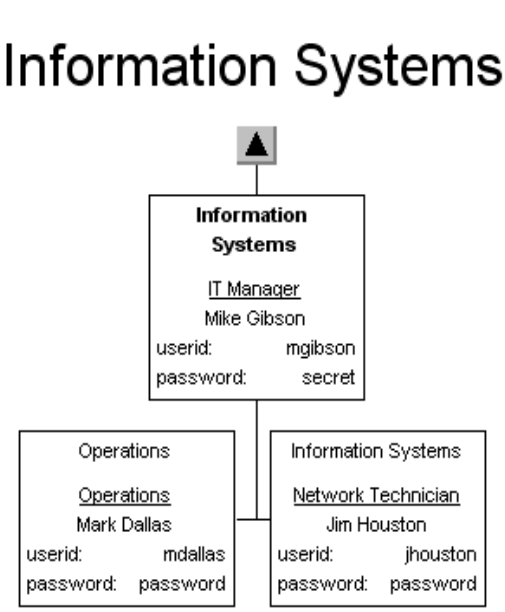

Figure 10

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In both examples so far, Mike has entered the chart at his box. This next scenario shows the user entering the chart starting at their supervisor's box with drilling up turned off. In the following figure and the resulting chart, the user is Jane Hamilton from the Sales department.

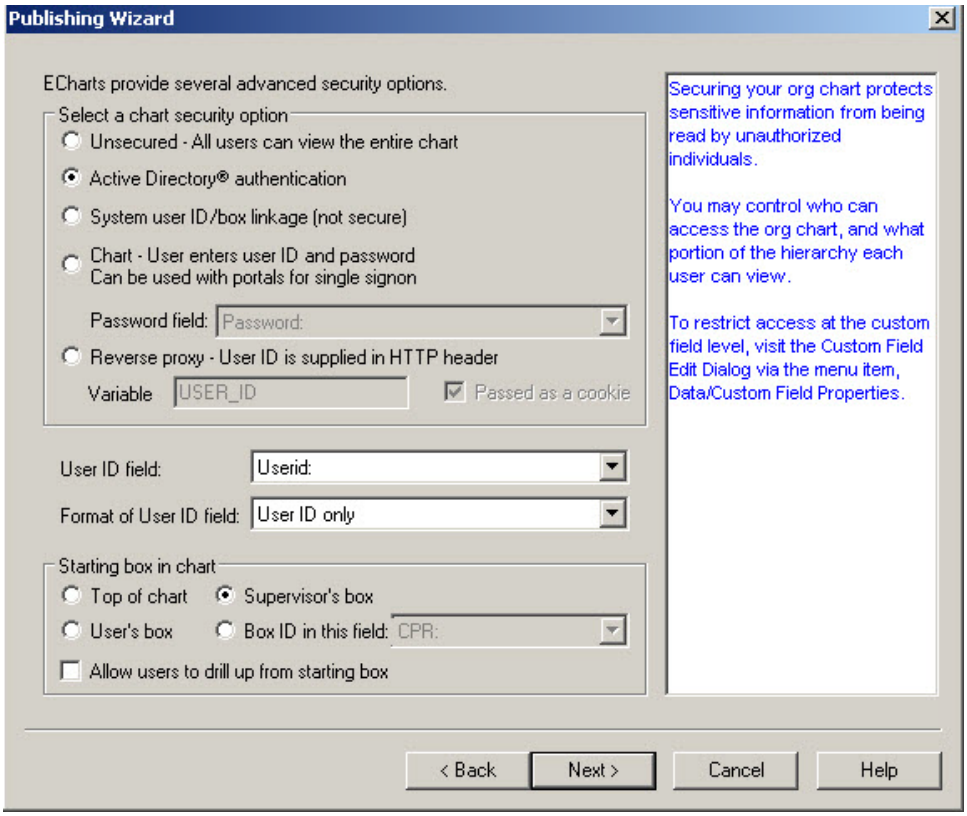
Publishing Wizard
ECharts provide several advanced security options.
Select a chart security option
Unsecured - All users can view the entire chart
Active Directory® authentication
System user ID/box linkage (not secure)
Chart - User enters user ID and password
Can be used with portals for single signon
Password field: Password:
Reverse proxy - User ID is supplied in HTTP header
Variable USER_ID
Passed as a cookie
User ID field: Userid:
Format of User ID field: User ID only
Starting box in chart
Top of chart
Supervisor's box
User's box
Box ID in this field: CPR:
Allow users to drill up from starting box
Securing your org chart protects sensitive information from being read by unauthorized individuals.
You may control who can access the org chart, and what portion of the hierarchy each user can view.
To restrict access at the custom field level, visit the Custom Field Edit Dialog via the menu item, Data/Custom Field Properties.
< Back
Next >
Cancel
Help

Figure 11

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Jane and her supervisor's box are both shown in the following figure.

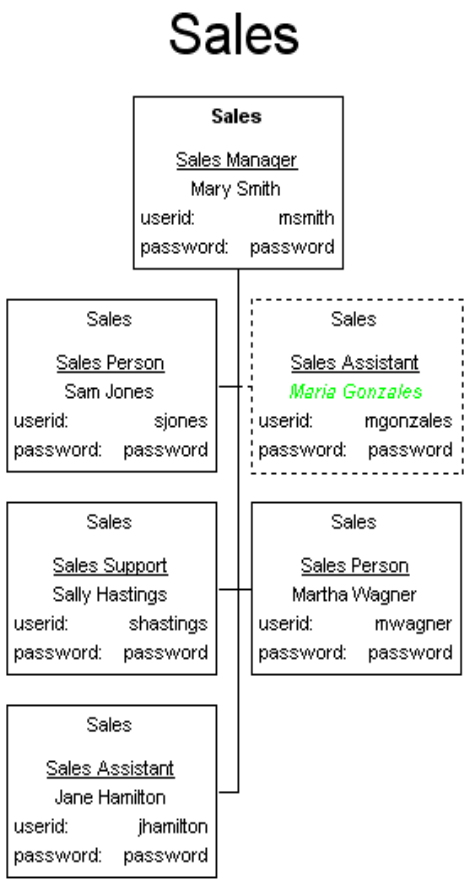

Figure 12

The last option in the **Starting box in chart** section is called **Box ID in this field**. It allows a custom field to identify the starting point in the chart after authentication has taken place.

In this example, Matthew Austin has decided that he would like to have Luke Franklin have the same view of the org chart that he does. To do this, a custom field (called **ProxyID** in this example) containing the box IDs of the starting box in the chart. For most people, this will be the same as their normal box ID. But in Luke's case, instead of his normal box ID, he will have the box ID of Matthew in the **ProxyID** custom field. This special value in Luke's record would be done programmatically in the data extract process. The publishing definition settings are shown in the next figure.

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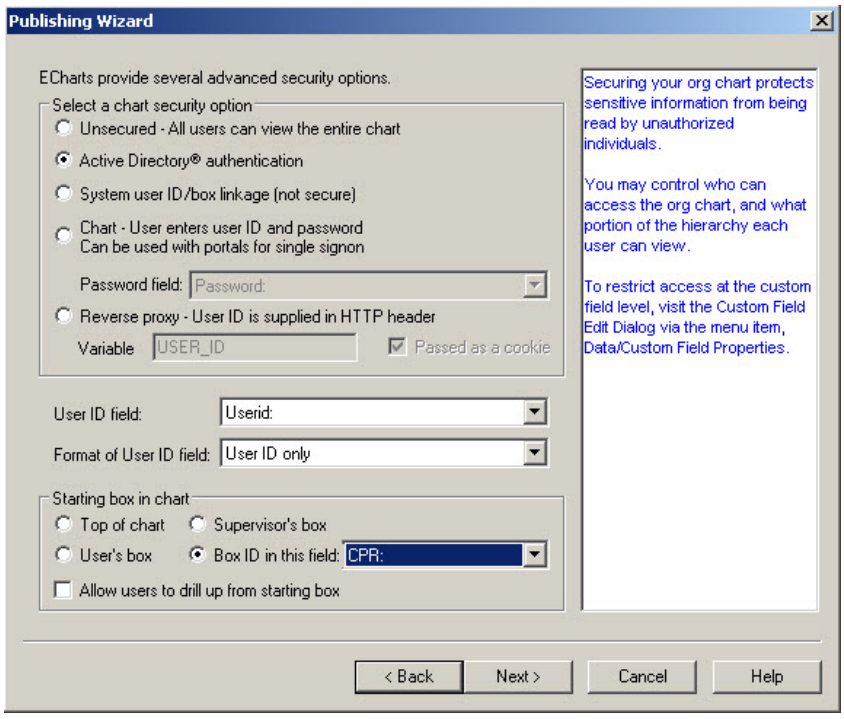
Publishing Wizard
ECharts provide several advanced security options.
Select a chart security option
Unsecured - All users can view the entire chart
Active Directory® authentication
System user ID/box linkage (not secure)
Chart - User enters user ID and password
Can be used with portals for single signon
Password field:
Password:
Reverse proxy - User ID is supplied in HTTP header
Variable
USER_ID
Passed as a cookie
User ID field:
Userid:
Format of User ID field:
User ID only
Starting box in chart
Top of chart
Supervisor's box
User's box
Box ID in this field:
CPR:
Allow users to drill up from starting box
Securing your org chart protects sensitive information from being read by unauthorized individuals.
You may control who can access the org chart, and what portion of the hierarchy each user can view.
To restrict access at the custom field level, visit the Custom Field Edit Dialog via the menu item, Data/Custom Field Properties.
< Back
Next >
Cancel
Help

Figure 13

The result shows the chart after Luke Franklin has logged in. Also shown are the **ProxyID** custom field values. Since Luke's **ProxyID** is set to a value of 1, after Luke authenticates to the chart he is able to view the chart from Matthew's point of view.

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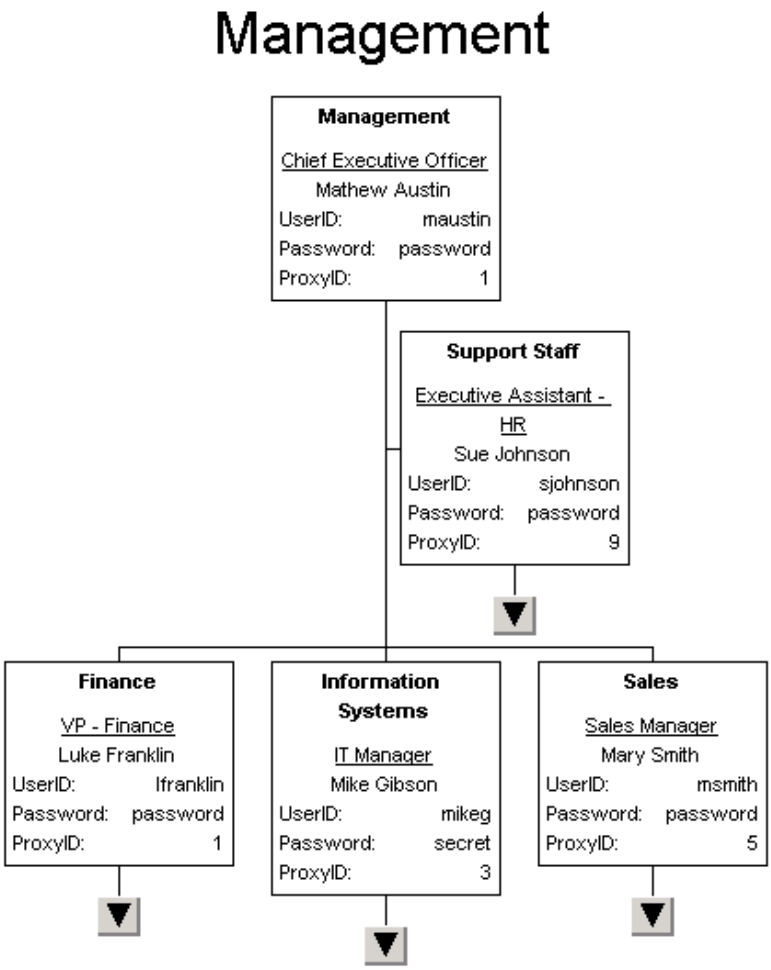

Figure 14

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Chart Authentication

The next figure shows that we have selected **Chart** user ID and password. To use this method of authentication, the user IDs and passwords must exist in separate custom fields in the chart. The field we have to chosen to contain the user ID is **userid** and the password field is **password**.

The **Starting box in chart** option behaves the same way for **Chart** and **System user ID/box linkage** as it does for Microsoft Active Directory® authentication.

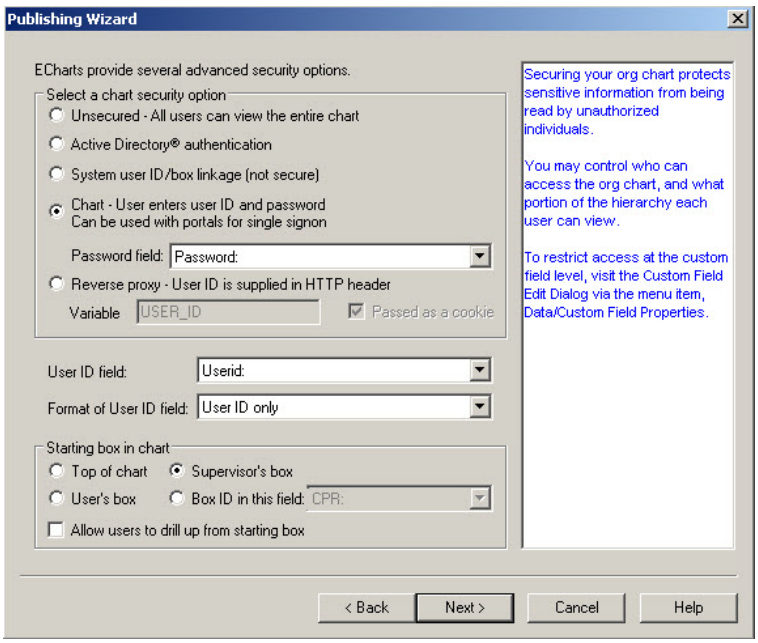
Publishing Wizard
ECharts provide several advanced security options.
Select a chart security option
Unsecured - All users can view the entire chart
Active Directory® authentication
System user ID/box linkage (not secure)
Chart - User enters user ID and password
Can be used with portals for single signon
Password field: Password:
Reverse proxy - User ID is supplied in HTTP header
Variable USER_ID
Passed as a cookie
User ID field: Userid:
Format of User ID field: User ID only
Starting box in chart
Top of chart
Supervisor's box
User's box
Box ID in this field: CPR:
Allow users to drill up from starting box
Securing your org chart protects sensitive information from being read by unauthorized individuals.
You may control who can access the org chart, and what portion of the hierarchy each user can view.
To restrict access at the custom field level, visit the Custom Field Edit Dialog via the menu item, Data/Custom Field Properties.
< Back
Next >
Cancel
Help

Figure 15

With manual authentication, when a user accesses a chart, OrgPublisher prompts her for her user ID and password. If they enter a valid user ID and password, OrgPublisher opens the chart at the starting box defined by the publishing definition.

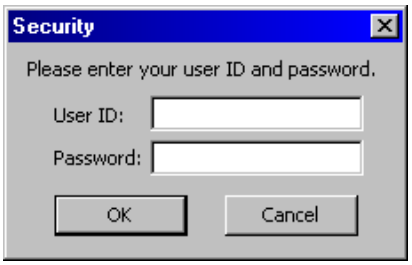

Figure 16

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EChart Thin Client Security

EChart Thin Client Security works in the same manner as Rich Client, with one important exception. With Thin Client security, you must manually login to access the chart, even when using Microsoft Active Directory® authentication.

If you don't want to be prompted for your user ID and password perform the following:

Note: *The Web server must be running IIS;* ***EChart Thin Client security does not work with Apache Web Server****.*

1. Click the **Start** button on the taskbar, select **Programs**, **Administrative Tools**, and **Internet Information Services**.

   The *Internet Information Services* window opens.

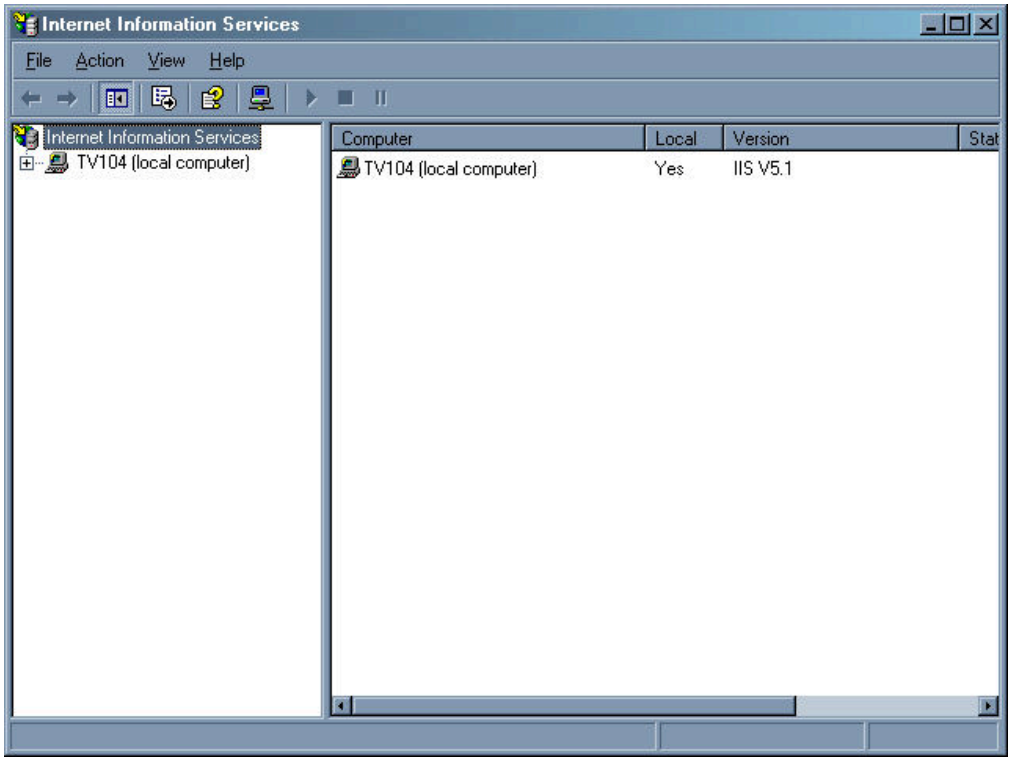

Figure 17

2. Expand the **(local computer)** entry.
3. Expand the **Web Sites**, and **Default Web Site** entries.
4. Right-click **ECharts** and select **Properties** from the context menu.

   The *ECharts Properties* dialog opens at the **Directory** tab.

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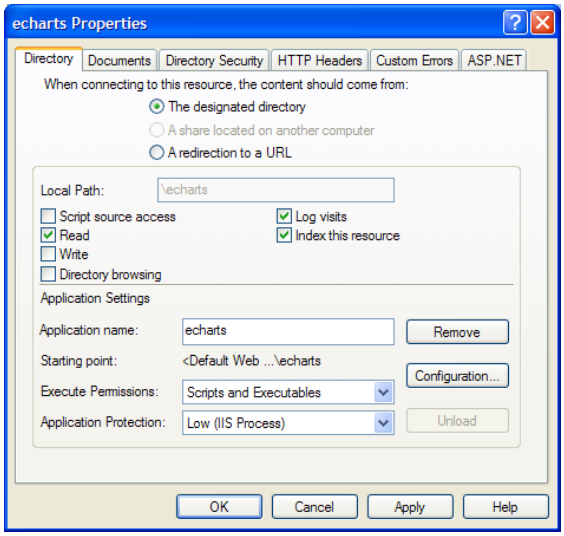

Figure 18

5. Click **Create**.

   The **Application Protection** and **Application name** fields become available.

6. Select **Low (IIS Process)** for **Application Protection**.

7. Click the **Directory Security** tab.

   The *Directory Security* tab opens.

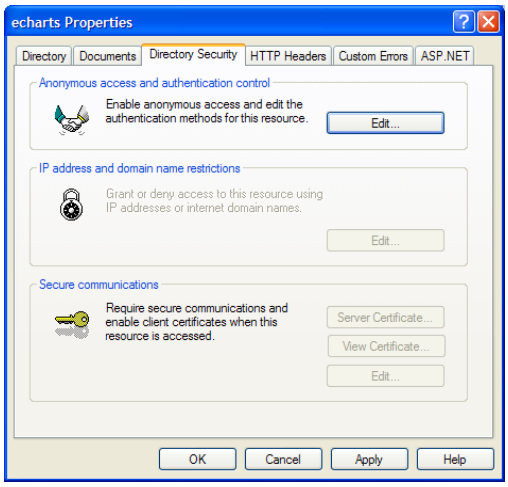

Figure 19

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8. Click **Edit** in the **Anonymous access and authentication control** section. The *Authentication Methods* dialog opens.

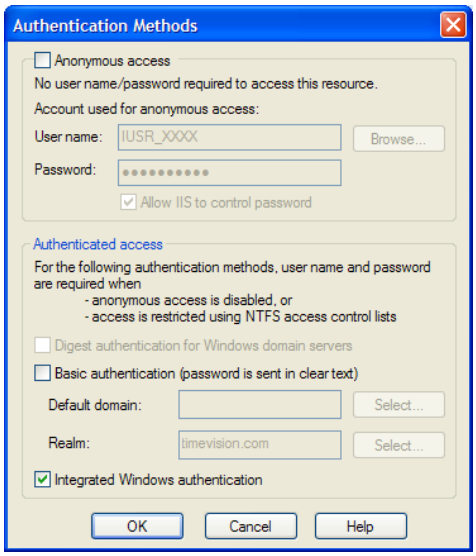

Figure 20

9. Clear the **Anonymous access** check box.
10. Set the **Integrated Windows Authentication** check box.
11. Click **OK** to close the *Authentication Methods* dialog. Click **OK** again to close the *EChart Properties* dialog.
12. Close the *Internet Information Systems* window.

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Selecting Role-based Toolbars

If you publish an EChart rich client, you can secure role-based toolbar buttons based on groups.

Note: *If your chart contains only one group, the lock icons are disabled.*

1. Create any groups needed to secure toolbar buttons.
2. Create a publishing definition for an EChart rich client after selecting the Advanced Mode option in the Publishing Wizard.
3. When you reach the toolbar button selection dialog, open locks appear to the left of each securable button.
4. Click on the lock to display security options.

Publishing Wizard
Select the toolbars and buttons you want enabled
Style selector
Status bar
Main toolbar
Save as
Copy"
Go to top"
Search
Toolbar search"
Zoom to point"
Zoom factor"
PowerPoint"
Print
Print preview"
Button is not secured. Click to assign to a group
Display whole chart
Drilling on/off
Displayed levels
Large About box button
Reset Style
Chart Layout"
Views toolbar
Style view
Tree view"
List view/Search view
Profile view
Summary view
9-Box view
Enable PluginX Copy"
Enable opening the search results in Microsoft Excel"
"Not applicable for thin client
You can select which buttons and toolbars to enable in the published chart. The items noted with an asterisk (* are in EChart thin client charts.
The Views toolbar provides the most flexibility to end users. PluginX Copy affects right-click menus and Copy buttons in the Chart, List, and Search Views. If you disable the PluginX Copy option, the Copy button in the toolbar is, in effect, also disabled.
< Back
Next >
Cancel
Help

Figure 21

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5. Right-click on the lock to display the available groups. Click to select individual groups or click on **(Select all groups)** to include all group results.

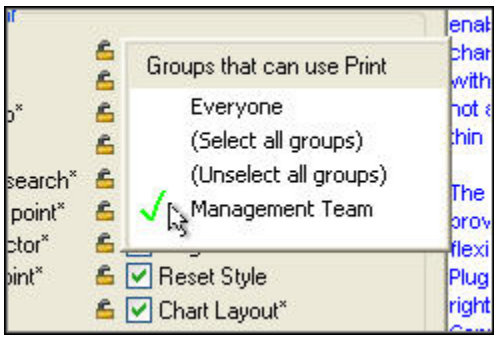

Figure 22

6. After selection, the lock appears closed and the button displays a green filled check box indicating that it is available for the restricted viewing audience.

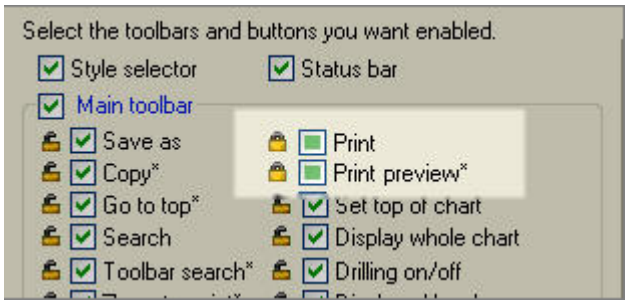

Figure 23

Only users who are in the selected groups have access to the locked buttons when they access the published EChart.

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EChart — Field Level (Role-based) Security Scenarios

EChart security also provides *field level* security. Field level security allows users to view information based on whether or not they are a member of a particular group.

For example, if you have a chart with salary information, you may want members of only the HR group to see the salaries. In such a case, use OrgPublisher to define a group called HR, based on whatever criteria in your data determines who is a member of HR. All other users are not members of HR.

The following chart shows two custom fields displayed: **salary** and **hr**.

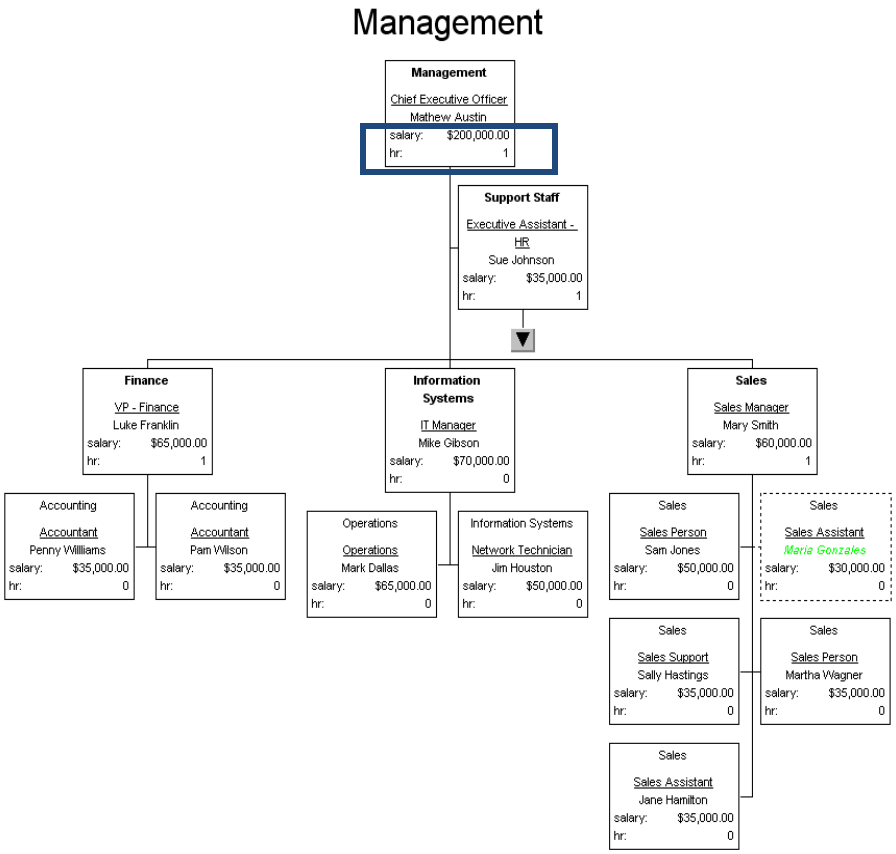

Figure 24

The **hr** custom field indicates whether or not the person is a member of your HR group (1=yes; 0=no).

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Using Groups to Create Field Level Security

Using OrgPublisher's *Group Editor* dialog you can search for and create a group. In this example, from the previous chart, there are four people that qualify for the HR group.

1. Save the group as **hr**.

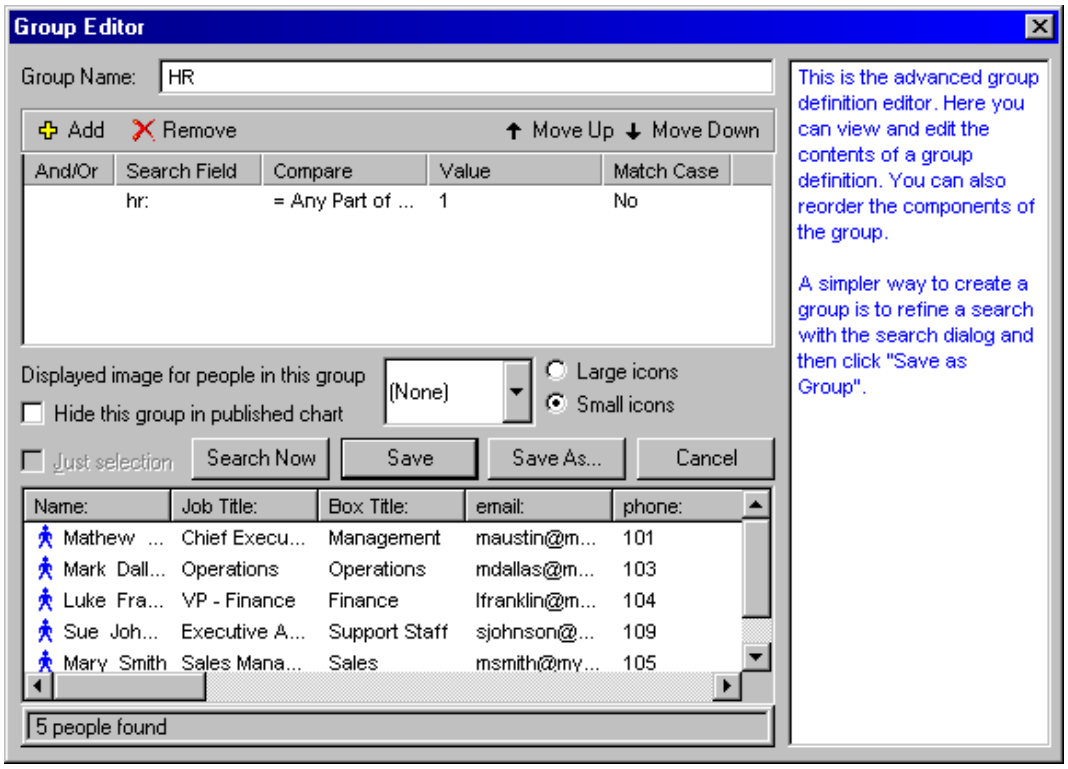

Figure 25

2. Close the *Group Editor* dialog and select **Custom field properties** from the **Data** menu.
3. Select the **salary** field by clicking its gray row selector button.

The *Custom Field Properties* dialog opens.

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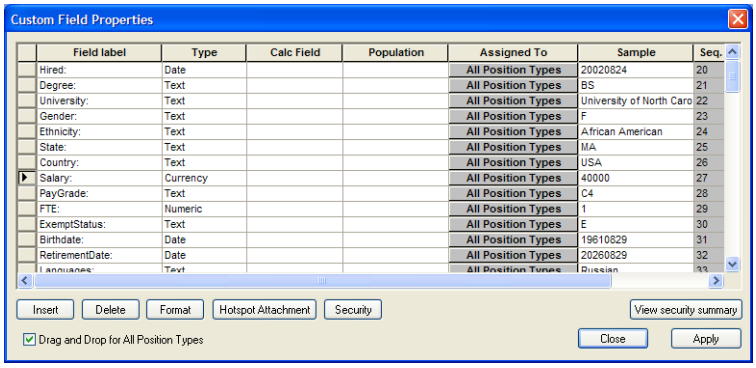
Custom Field Properties
Field label
Type
Calc Field
Population
Assigned To
Sample
Seq.
Hired: Date All Position Types 20020824 20
Degree: Text All Position Types BS 21
University: Text All Position Types University of North Caro 22
Gender: Text All Position Types F 23
Ethnicity: Text All Position Types African American 24
State: Text All Position Types MA 25
Country: Text All Position Types USA 26
Salary: Currency All Position Types 40000 27
PayGrade: Text All Position Types C4 28
FTE: Numeric All Position Types 1 29
ExemptStatus: Text All Position Types E 30
Birthdate: Date All Position Types 19610829 31
RetirementDate: Date All Position Types 20260829 32
Insert
Delete
Format
Hotspot Attachment
Security
View security summary
Drag and Drop for All Position Types
Close
Apply

Figure 26

4. Click **Security**.
   The *Security* dialog opens.

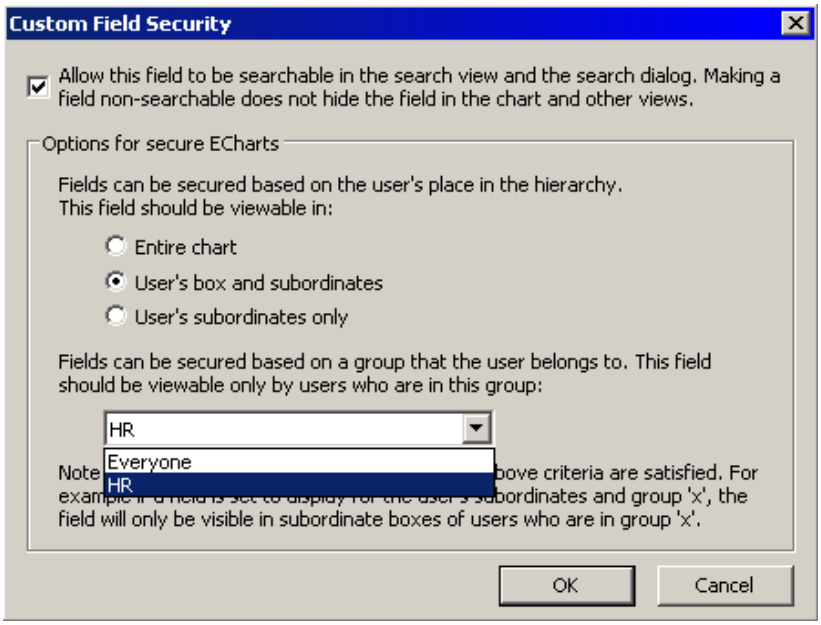
Custom Field Security
Allow this field to be searchable in the search view and the search dialog. Making a field non-searchable does not hide the field in the chart and other views.
Options for secure ECharts
Fields can be secured based on the user's place in the hierarchy.
This field should be viewable in:
Entire chart
User's box and subordinates
User's subordinates only
Fields can be secured based on a group that the user belongs to. This field should be viewable only by users who are in this group:
HR
Everyone
HR
bove criteria are satisfied. For
field will only be visible in subordinate boxes of users who are in group 'x'.
OK
Cancel

Figure 27

5. Select the **Allow this field to be searchable** check box.
6. Select a visibility for the field: the **User's box and subordinates**, or for the **User's subordinates only** (selecting **Entire chart** will not hide the field).
7. Select **HR** from the drop-down list (selecting **Everyone** will not hide the field).

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8. Click **OK** to close the *Security* dialog, and then click **Close** in the *Custom Field Properties* dialog.

In this scenario, Mike Gibson *is not* a member of the HR group. When he views the chart, he does not see salary information.

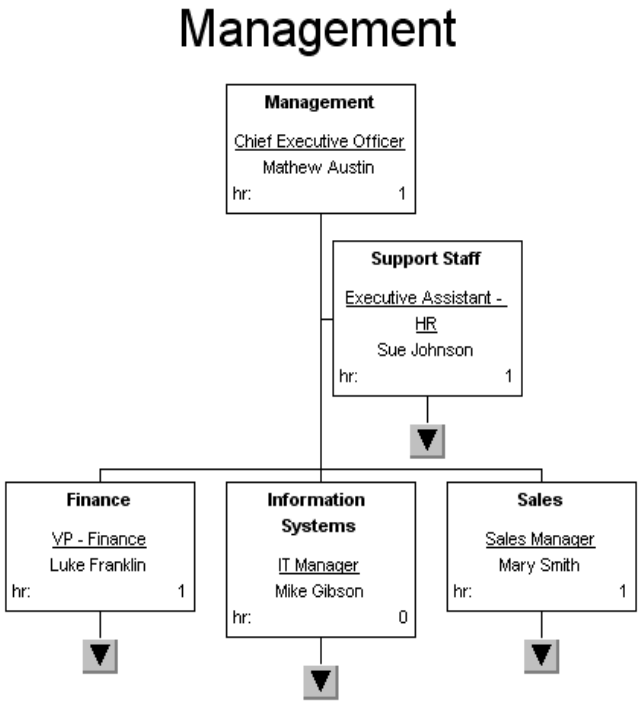

Figure 28

Mary Smith *is* a member of the HR group. When she views the chart, she sees salary information. Note that she sees it throughout the entire chart. This is because when we set the security options in the C*ustom Field Properties* dialog, we set the option to **Entire chart**.

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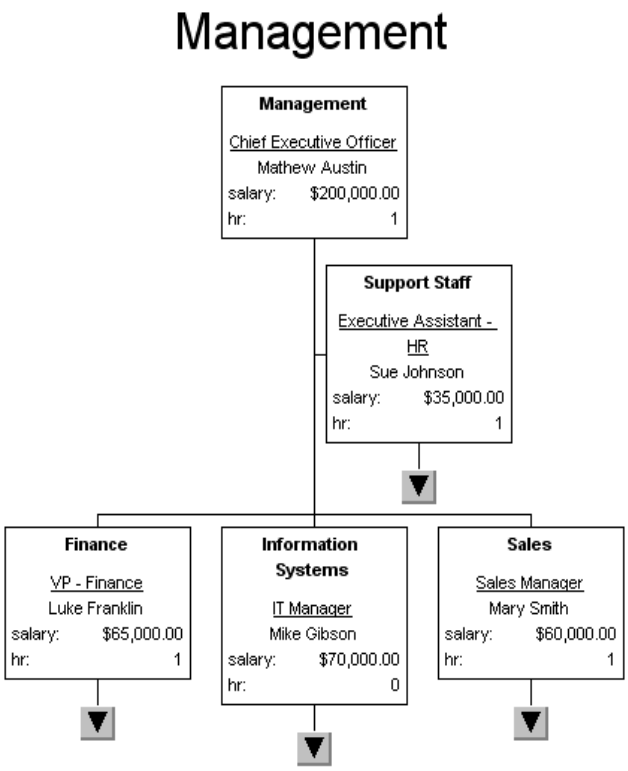

Figure 29

Now we will limit Mary to seeing salary information for her and her subordinates only.

9. Open the *Custom Field Properties* dialog.
10. Select the **salary** field.
11. Click **Security**.

    The *Custom Field Security* dialog opens.

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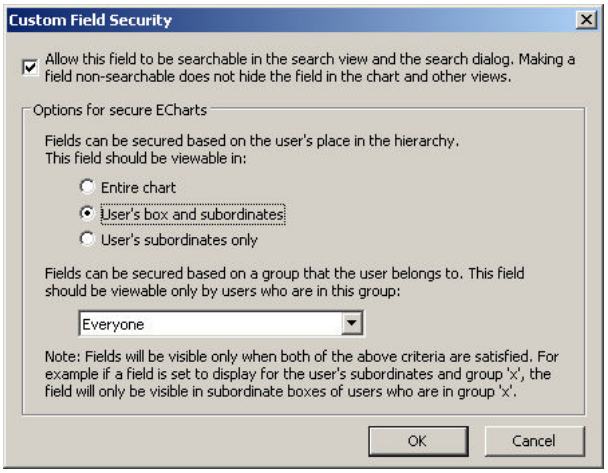
Custom Field Security
Allow this field to be searchable in the search view and the search dialog. Making a field non-searchable does not hide the field in the chart and other views.
Options for secure ECharts
Fields can be secured based on the user's place in the hierarchy. This field should be viewable in:
Entire chart
User's box and subordinates
User's subordinates only
Fields can be secured based on a group that the user belongs to. This field should be viewable only by users who are in this group:
Everyone
Note: Fields will be visible only when both of the above criteria are satisfied. For example if a field is set to display for the user's subordinates and group 'x', the field will only be visible in subordinate boxes of users who are in group 'x'.
OK
Cancel

Figure 30

12. Select the **Allow this field to be searchable** check box.
13. Select **User's box and subordinates**.
14. Click **OK** to close the *Custom Field Security* dialog, and then click **Close** in the *Custom Field Properties* dialog.

    Now when Mary views the chart, she sees salary for only her and her subordinates, as shown in the following figure.

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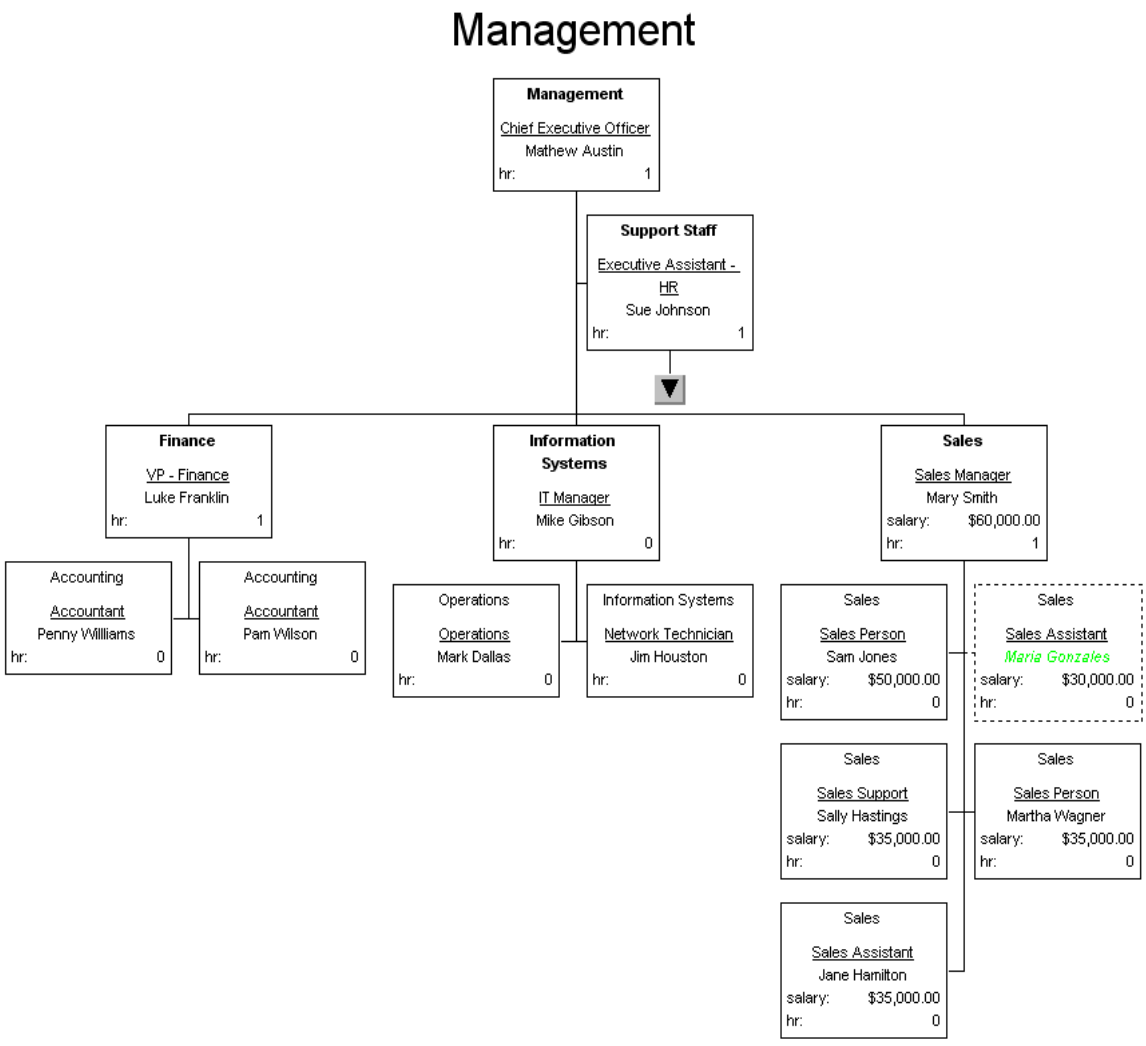

Figure 31

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EChart Style Security

With OrgPublisher 7 and later, EChart Rich Client security provides *style based* security. Style based security allows users to view different styles based on group membership.

For example, if you have a chart with salary information, you can create a style that shows only the salary information. Using the same scenario as in EChart — Field Level (Role-based) Security Scenarios above, you can set the HR group to view a style called **Secure**. Users in the HR group can then see the **Secure** style, while users not in the HR group can not see that style.

To configure style based security:

1. Open the **File** menu and select **Styles**.
   The *Styles* dialog opens.

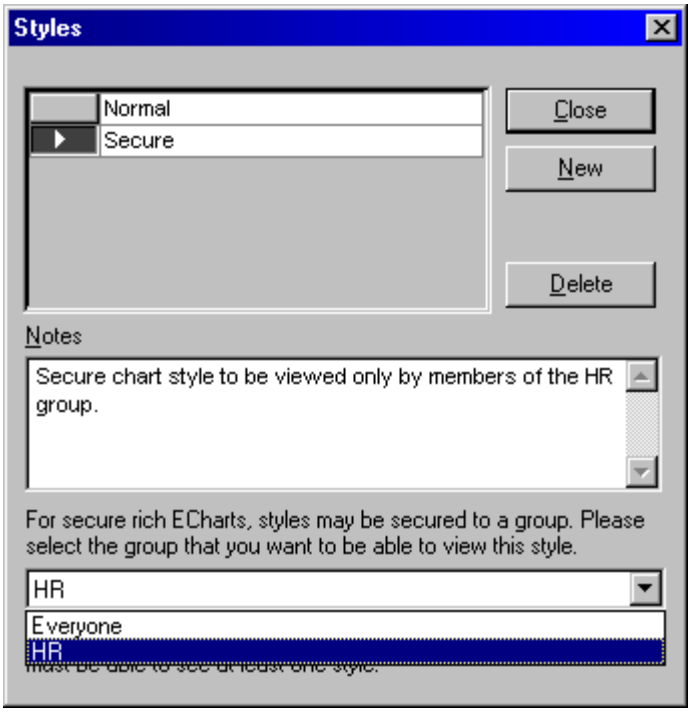
Styles
Normal
Secure
Close
New
Delete
Notes
Secure chart style to be viewed only by members of the HR group.
For secure rich ECharts, styles may be secured to a group. Please select the group that you want to be able to view this style.
HR
Everyone
HR

Figure 32

2. Select the restricted style by clicking the row selector button next to the **Secure** field.
3. In the lower pane of the dialog, select the group from the drop-down list that can view the selected style.
4. Click **Close**.

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Style Based Security Scenarios

Mike Gibson is not a member of the HR group. When he views the chart, he sees only the **Normal** style, not the **Secure** style, as shown in the following.

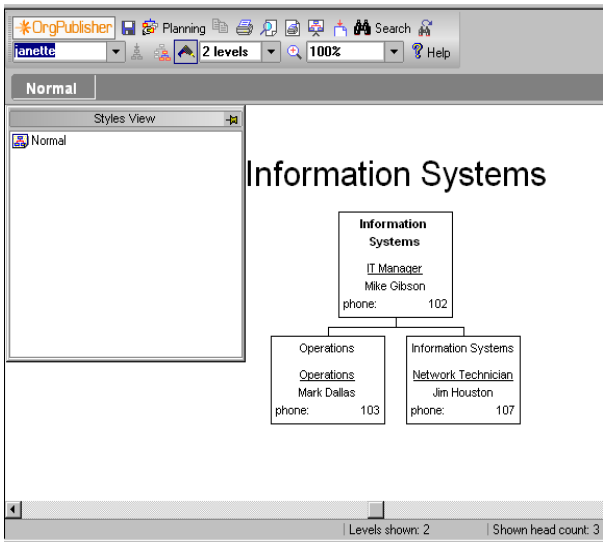

Figure 33

Mary Smith is a member of the HR group. When she views the chart, she sees both the **Secure** style and the **Normal** style as shown in the following chart.

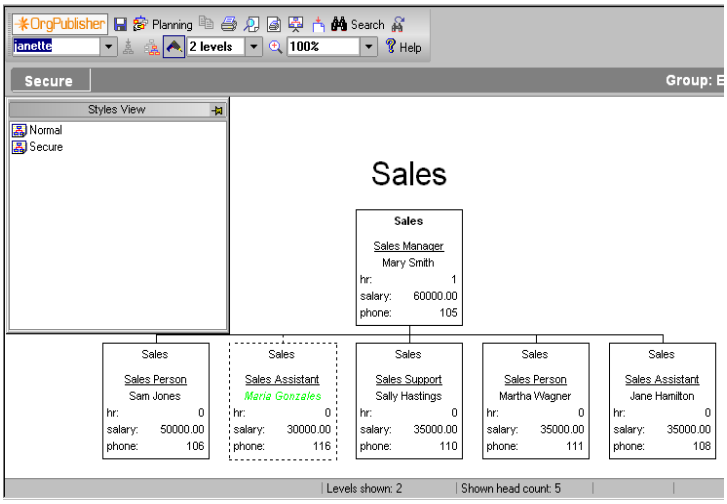

Figure 34

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OrgPlan Security (OrgPublisher Premier)

With OrgPublisher 7 and later, you can work with web-enabled what-if planning charts. OrgPlan provides the ability to create and share organizational models. These charts contain separate menus from the standard published charts.

When a chart is published in OrgPublisher (Enterprise version only) with the **OrgPlan what-if planning** feature enabled, end users can open the PluginX or EChart rich client chart and create a new OrgPlan chart or work with existing OrgPlan charts. The following figure indicates the *Publishing Wizard* dialog where the OrgPlan option is selected.

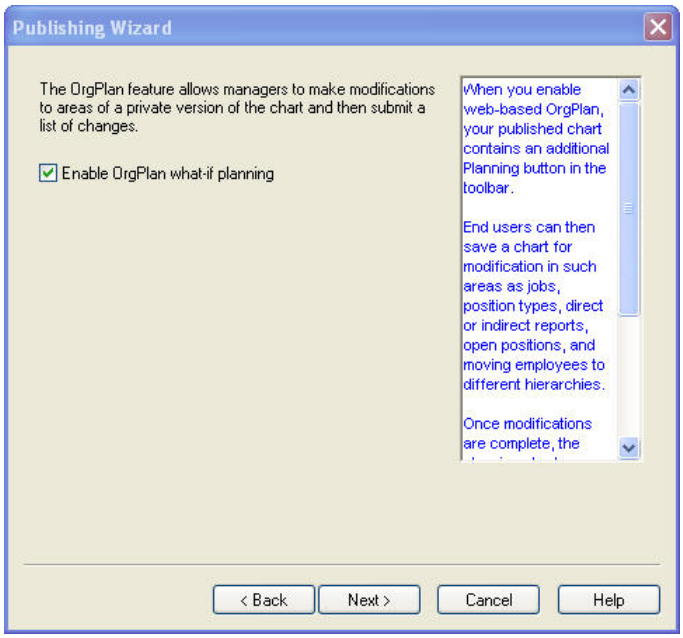
Publishing Wizard
The OrgPlan feature allows managers to make modifications to areas of a private version of the chart and then submit a list of changes.
Enable OrgPlan what-if planning
When you enable web-based OrgPlan, your published chart contains an additional Planning button in the toolbar.
End users can then save a chart for modification in such areas as jobs, position types, direct or indirect reports, open positions, and moving employees to different hierarchies.
Once modifications are complete, the
< Back
Next >
Cancel
Help

Figure 35

Selecting the **OrgPlan what-if planning** option opens the *Planning Charts* dialog in the *Publishing Wizard*. Here you can select whether or not users are required to use a password on any what-if planning charts initiated by a user.

If you do not select this option, then setting a password for the OrgPlan chart is optional for the user creating or saving the chart.

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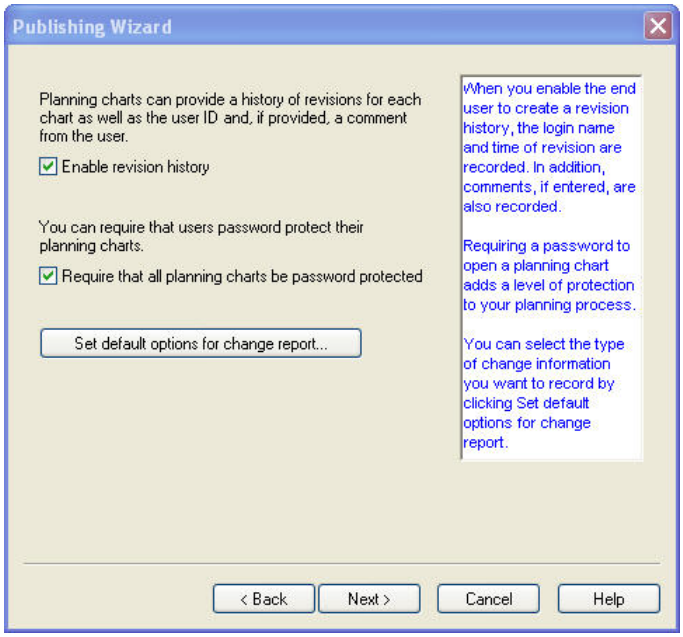
Publishing Wizard
Planning charts can provide a history of revisions for each chart as well as the user ID and, if provided, a comment from the user.
Enable revision history
You can require that users password protect their planning charts.
Require that all planning charts be password protected
Set default options for change report...
When you enable the end user to create a revision history, the login name and time of revision are recorded. In addition, comments, if entered, are also recorded.
Requiring a password to open a planning chart adds a level of protection to your planning process.
You can select the type of change information you want to record by clicking Set default options for change report.
< Back
Next >
Cancel
Help

Figure 36

The following figure shows the *Create New Planning Chart* dialog that opens when you create a new OrgPlan chart.

The **Password Protect This Chart** option is unavailable, which will require that this chart have a password. Once created, OrgPublisher prompts anyone attempting to open this planning chart for a password.

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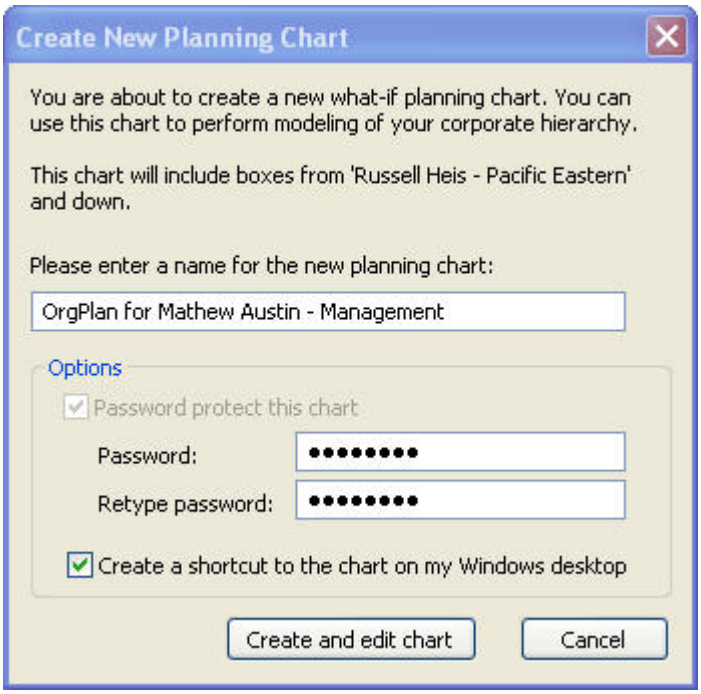
Create New Planning Chart
You are about to create a new what-if planning chart. You can use this chart to perform modeling of your corporate hierarchy.
This chart will include boxes from 'Russell Heis - Pacific Eastern' and down.
Please enter a name for the new planning chart:
OrgPlan for Mathew Austin - Management
Options
Password protect this chart
Password:
Retype password:
Create a shortcut to the chart on my Windows desktop
Create and edit chart
Cancel

Figure 37

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OrgPublisher 9 EChart Server Setup

VERSION 9

aquire OrgPublisher

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OrgPublisher ECharts

The purpose of this document is to provide detailed information on OrgPublisher's ECharts and the information you need to deploy this feature.

EChart publishing is designed to publish charts with a large number of records and/or custom fields, or when you would like to publish secure charts based on authentication methods (Microsoft® Active Directory or custom methods using custom fields). ECharts are published in two ways: EChart Rich Client uses the OrgPublisher PluginX discussed in this document. EChart Thin Client requires no end user browser component add-on.

A Microsoft® IIS (ISAPI enabled) Windows® XP, Windows® 2003 Web server, Windows® 2008 Web server or Apache™ HTTP Server 2.0+ running Windows® operating system is required to display an EChart. A virtual directory with execute permissions for scripts and executables must exist on the Web server. The URL to the virtual directory is entered as part of an EChart publishing definition.

Several files are created when ECharts are published. These files can either be published to the virtual directory folder, or published locally and then copied to the virtual directory folder. OrgPublisher includes an FTP client that can be configured in the publishing definition.

All files have the same name with different extensions:

- **.ocp** — Similar to a current OCP file except that it contains no records. Instead, it contains information needed to contact the EChart server.
- **.dll** — The ISAPI DLL file. This is the Web server control file that controls loading and unloading of chart data into memory.

Note: *The DLL file must be replaced if you upgrade OrgPublisher.*

- **.htm** — The standard htm file created when publishing. This is the file used to access the org chart. PluginX is required to view a Rich Client EChart.
- **.js** — This is a Java Script file that is called by the HTM file. It checks the codebase value and provides the code necessary to call the PluginX and load the chart file.
- **cfg.xml** — This file is used only by EChart Real-time charts and Thin Client charts.
- **.odbx** — This file indicates multiple data sources were used to create the chart.

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- **.ocs** — The EChart data file. This file contains the actual chart data.

  Note: *All file security authentication access for this file must be removed to prevent users from downloading it. Use IIS manager, changing the file properties on the* ***File Security*** *tab.*

- **.bat** — A batch file that can be used for automated publishing of the EChart. The publishing process will only create this file if it does not already exist. It performs the following steps:

  - Unloads data from the EChart server's memory. This is important because if the server has data loaded, it might not have enough memory to publish.
  - Publishes the EChart.
  - Loads the new EChart data into the server's memory.

  The BAT file must be executed to refresh the chart. The Publishing Wizard cannot unload and load the data.

  The batch file is created using the current computer where OrgPublisher is installed. If you publish to a different computer than the one OrgPublisher is installed on, the batch file will require modification because paths change.

Log Files

ECharts log activity when published and accessed using EChart security. The log file is the same name as the file that is published. When the Web service is restarted, the next access to the EChart causes a new log file to be created. The previous log file is renamed to preserve past information. This occurs up to 9 times. After that, each log file is cycled through the 9 backup files, and the 10th file is then lost.

Special EChart Security Considerations

Normally ECharts are published to a physical chart folder with Scripts and Executable Permissions and users access it with a link to the virtual directory where the files were published. Figure 1 shows the normal access flow.

- The HTM is accessed.
  - The HTML code checks to see that the OCX is loaded. If it is not loaded, it attempts to automatically download and install it (see PluginX section)
  - The HTML code then calls the OCP file

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- The OCP file points to the DLL location. This location is the published virtual directory *specified when creating the publishing definition*.
- The DLL file assumes the OCS file is in the same folder as the DLL. It accesses the OCS file, filters the actual chart data based on security definitions for the published chart, and serves the resulting data as an org chart to the browser.

Normal Echart File Flow

Physical Chart Folder/URL with Scripts and Executable Permissions

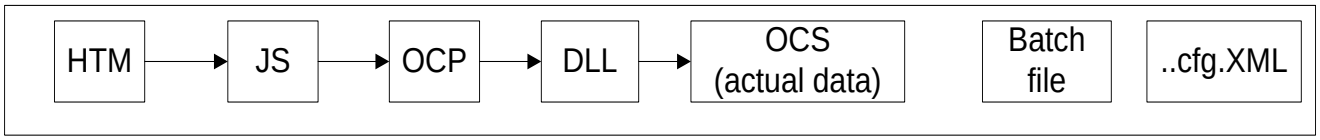

Figure 1

Note: *This scenario creates a security issue, due to the fact that you have a folder that has execute permissions. If a non-authorized DLL was placed in this folder, functions from this DLL could be executed from the virtual directory.*

Starting with OrgPublisher 7, the DLL is engineered to first look for the OCS file in the same folder where it resides, and if it does not find it, it then looks for an INI file that contains the path of the OCS file. This data flow is shown in Figure 2 below.

New Echart File Flow

Physical Chart Folder with no execute permissions

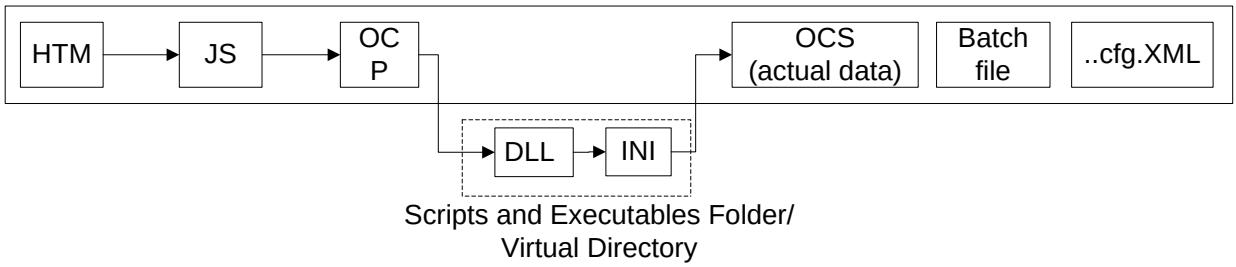

Figure 2

This new capability allows you to publish chart files to a physical directory that is different from the virtual directory, allowing you to "isolate" the Scripts and Executables folder.

The INI file would have a section that is the same name as the published EChart. Below is an example.

```
[OrgPublisherEChart]
OCS_PATH="C:\Path\To\Ocs\File.ocs"
```

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Multiple ECharts on a Web Server

When multiple ECharts exist in the same virtual directory, they all share a single process (**dllhost.exe**). There is a limit of four (4) memory allocations a single instance of dllhost.exe can perform.

The implementation solution for this scenario involves running each EChart in a separate instance of **dllhost.exe**. When run this way, each EChart has its own process in which to live. It's also much safer. In the event of an error, only the affected EChart will stop responding.

To implement this, create a virtual directory on the Web server for each EChart. The virtual directories should have execute permission and 'Application Protection' set to 'High (isolated)'. The charts are then accessed through their respective virtual directories. HTTP redirects can be used so that the end user is unaware that multiple virtual directories are used.

Internet / Intranet Web Server

The OrgPublisher application utilizes a Windows® platform computer, which can be either a network computer or a Web server. For large charts utilizing EChart publishing (discussed later in this document), a Web server utilizing Microsoft® Internet Information Server (IIS) is required.

EChart Server Requirements

- Pentium® PC compatible or greater
- A Microsoft® IIS (ISAPI enabled) Windows® 2003, Windows® 2008, Windows® XP, Web server or Apache™ HTTP Server 2.0+ running Windows® operating system
- A virtual directory with execute permissions for scripts and executables on the Web server
- 60 MB available hard disk space
- 1 GB of RAM minimum, depending on chart size

Web Browser Requirements

Determine the publishing option that best fits the need of the organization. Different browser and server requirements apply depending on the selected publishing option.

Publishing option choices include:

- Graphic, HTML, (publishing formats that require no additional browser components).

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- PDF, requires free Adobe® Acrobat® Reader® 9
- PluginX, which provides interactive org charts. This option requires installation of the OrgPublisher PluginX component.
- EChart Rich Client, which also requires the OrgPublisher PluginX component.
- EChart Thin Client, which requires no plug-in to view the published chart

OrgPublisher PluginX Browser Specifications

(EChart Rich or PluginX options)

- Pentium® PC compatible or greater
- Microsoft Windows® XP, or Windows® Vista™ operating system
- 512 MB of RAM
- 60 MB available hard disk space
- Microsoft® Internet Explorer 6 and later for all versions of Windows® mentioned above

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Charts on Windows® Server 2003

When publishing to Windows® Server 2003, some additional settings are required.

You may also have to refer to the *Set the MIME Type* section later in this document.

Web Server Extension

1. Open the *Control Panel* window.
2. Open the *Administrative Tools* window.
3. Open the *Internet Information Services* window.
4. Expand **Internet Information Services**.
5. Expand the **(local computer)** option.
6. Expand **Web Service Extensions**.
7. In the right pane of the window, select **Add a new Web service extension**. The *New Web Service Extension* dialog opens.
8. Type a name that represents the name of the file you publish as an EChart in the **Extension name** field.
9. Click **Add** next to the **Required files** pane, and **Browse** to the published chart folder. Select the EChart file name that ends with the **.dll** extension.
10. Select the **Set extension status to Allowed** check box.
11. Click **OK** to close the New *Web Service Extension* dialog.
12. Close the *Internet Information Services*, *Administrative Tools*, and *Control Panel* windows.

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EChart Server Setup

To set up the EChart server, do the following:

1. In Windows® Explorer, create the folder **c:\inetpub\wwwroot\Echarts**.
2. Right-click **My Computer** and select **Manage**. Expand **Services and Applications**, **Internet Information Services**, and **Default Web Site**.

   The *Computer Management* window opens.

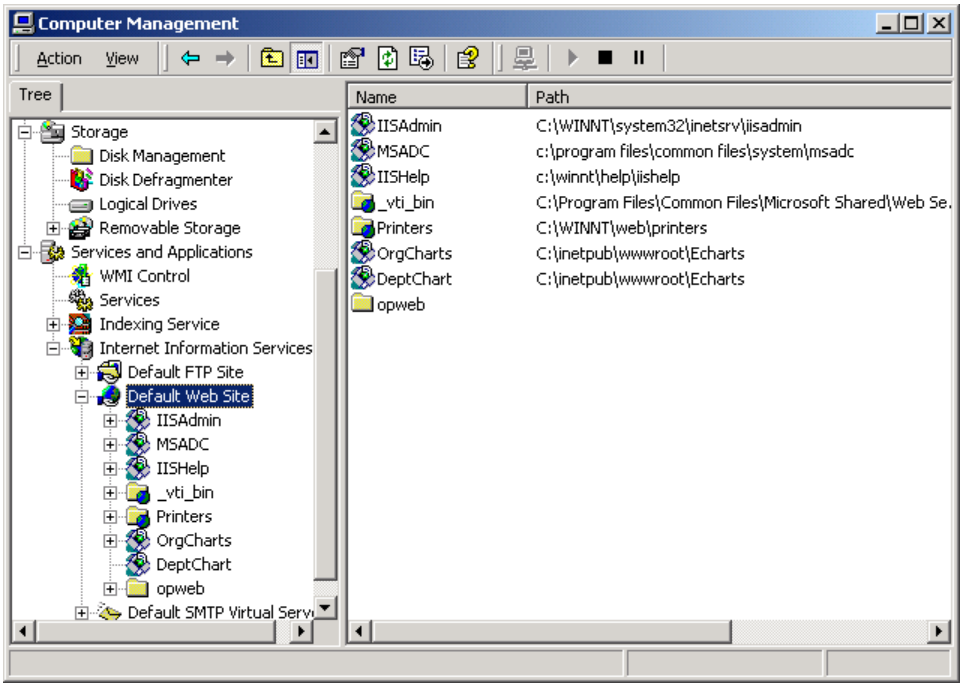

Figure 3

3. Right-click **Default Web Site** and point to **New**, then to **Virtual Directory**.

   The *Virtual Directory Creation Wizard* opens.

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Virtual Directory Creation Wizard
Welcome to the Virtual Directory Creation Wizard
This wizard will help you create a new virtual directory on this web site.
Click Next to continue.
< Back
Next >
Cancel

Figure 4

4. Click **Next**.
   The *Virtual Directory Alias* screen opens.

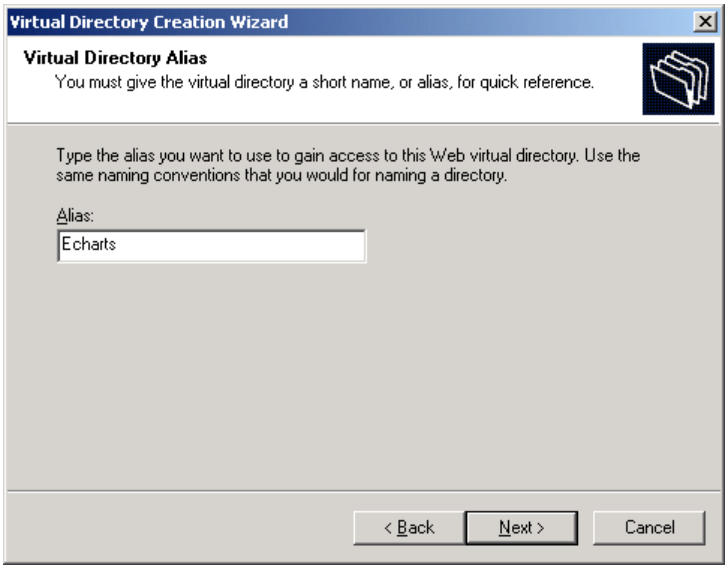
Virtual Directory Creation Wizard
Virtual Directory Alias
You must give the virtual directory a short name, or alias, for quick reference.
Type the alias you want to use to gain access to this Web virtual directory. Use the same naming conventions that you would for naming a directory.
Alias:
Echarts
< Back
Next >
Cancel

Figure 5

5. Use **Echarts** as the **Alias**. Click **Next**.
   The *Web Site Content Directory* screen opens.

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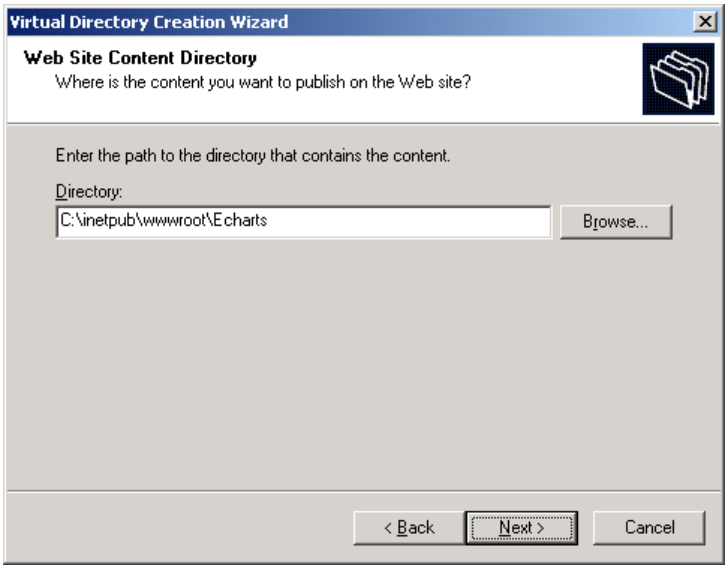
Virtual Directory Creation Wizard
Web Site Content Directory
Where is the content you want to publish on the Web site?
Enter the path to the directory that contains the content.
Directory:
C:\inetpub\wwwroot\Echarts
Browse...
< Back
Next >
Cancel

Figure 6

6. Browse to **C:\inetpub\wwwroot\Echarts** and click **Next**. The *Access Permissions* screen opens.

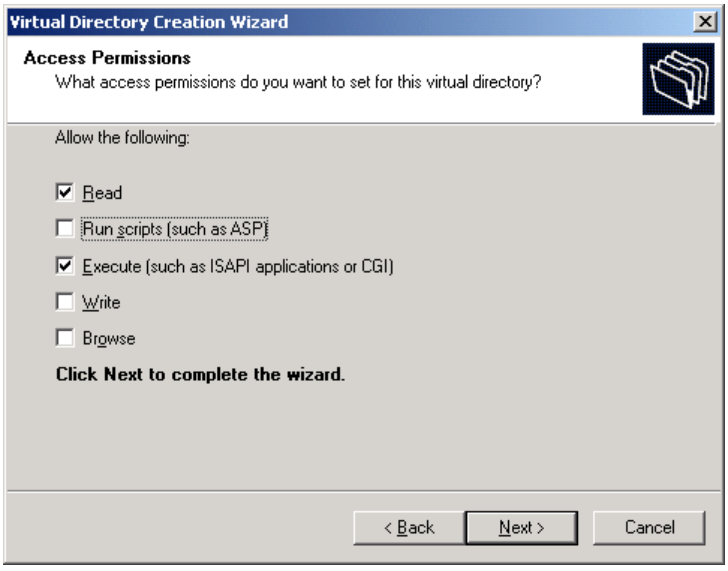

Figure 7

7. Select the **Read** and **Execute** check boxes, and clear the other check boxes. Click **Next**.

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The *You have successfully completed the Virtual Directory Creation Wizard* dialog opens.

8. Click **Finish**.

   The *Virtual Directory Creation Wizard* closes.

9. In the *Computer Management* window, right-click the **Echarts** folder and select **Properties**.

   The *Echarts Properties* dialog opens to the **Virtual Directory** tab (Figure 8).

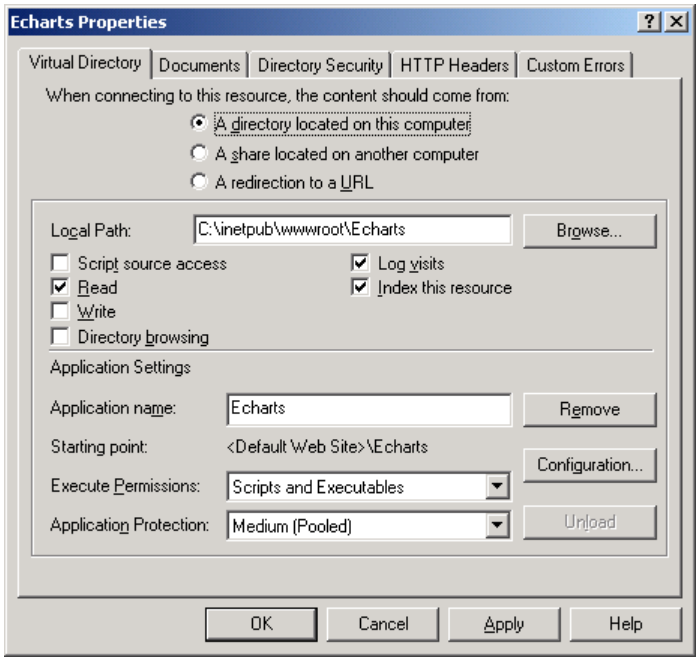

Figure 8

10. Select the **Read** check box.
11. Select **Scripts and Executables** from the **Execute Permissions** drop-down list.
12. Click the **Directory Security** tab.

    The *Directory Security* tab opens.

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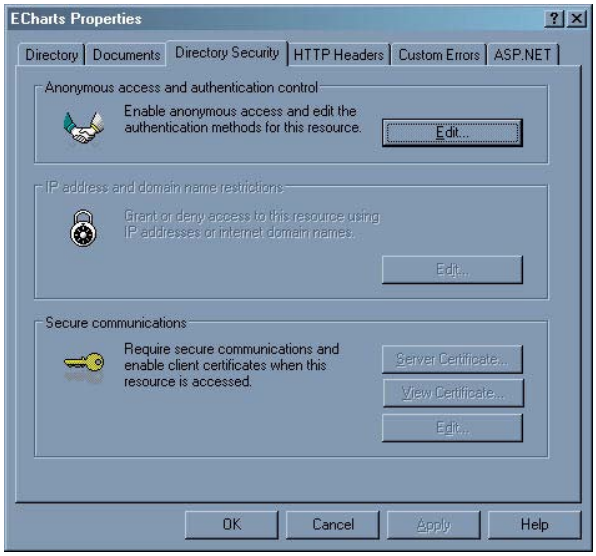

Figure 9

13. In the **Anonymous access and authentication control** section, click **Edit**.

    The *Authentication Methods* dialog opens.

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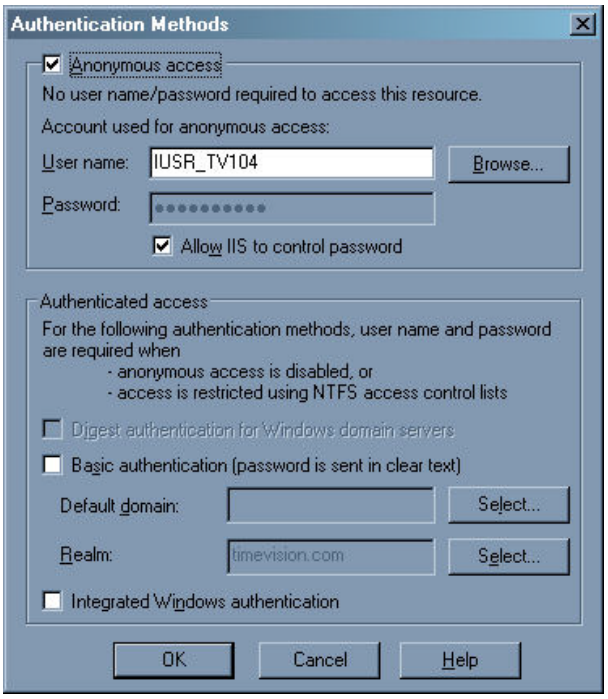

Figure 10

14. Select the **Anonymous access** check box.

    Make sure the **Username** is **IUSR_*<computername>***, where <***computername***> is the name of the EChart server hosting the Web server.

15. Select the **Allow IIS to control password** check box and click **OK**.

    The *Anonymous User Account* dialog closes.

16. Click **OK** on the *ECharts Properties* dialog, and close the *Computer Management* window.

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Choosing DCOM Settings

Note: *The following instructions apply to both Microsoft Windows® 2003 and Microsoft Windows® 2008.*

1. Start OrgPublisher from the server where it is installed.

   This loads the application into **DCOM**.

2. Close OrgPublisher

3. Click the **Start** button on the taskbar, and select **Run**.

   Type **DCOMCNFG** in the **Open** field and click **OK**.

Note: *If you receive a* CLSID Warning *message, click* ***Yes****.*

The Microsoft Windows® 2003 and 2008 COM Properties dialog opens

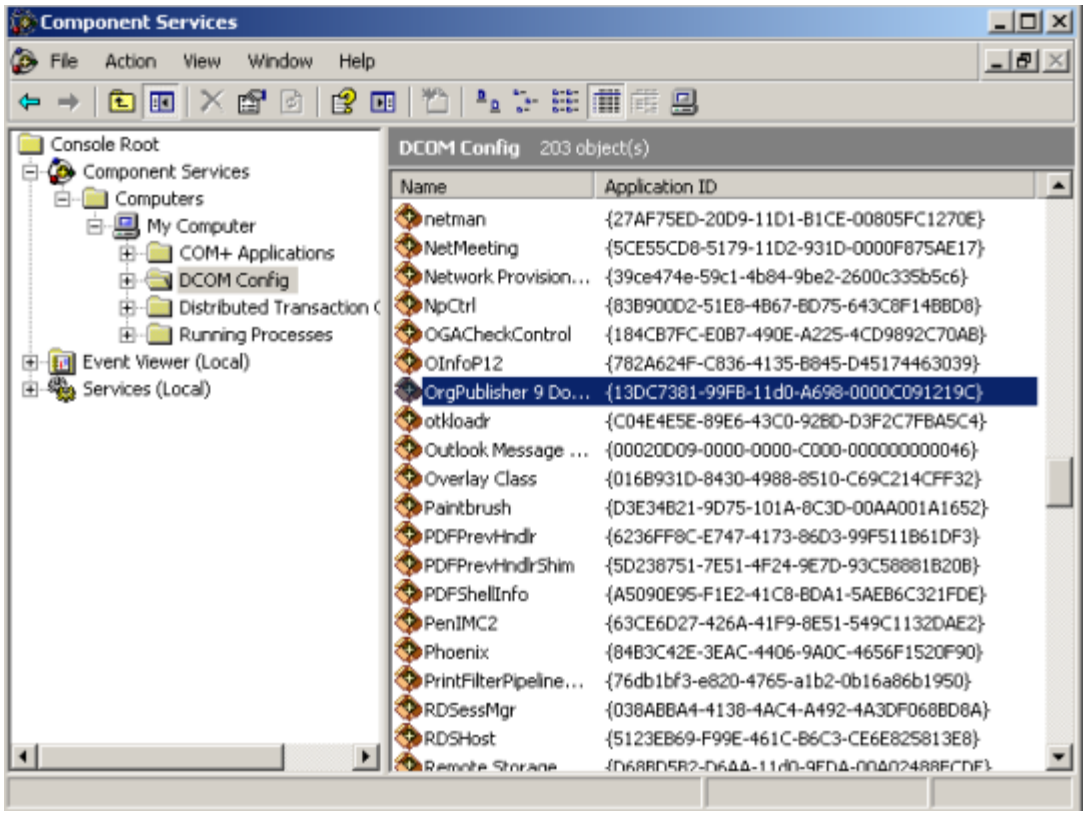

Figure 11

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4. **Search for** OrgPublisher 9 Document**; right-click and select** Properties**.**

   The OPAuto Document Properties dialog opens.

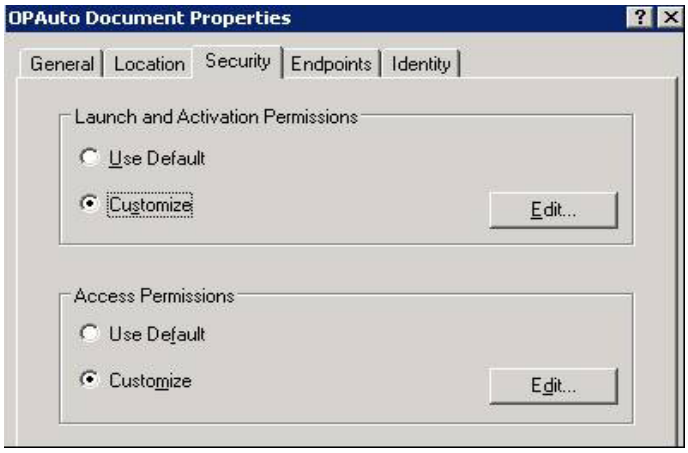

Figure 12

5. Select the **Security** tab to set the **Launch and Activation Permissions** and the **Access Permissions**.
6. In the **Launch and Activation Permissions** section, select **Customize,** and then click the associated **Edit** button

Note: *Make sure the users and groups are from the **WebServer**.*

7. Add the following **Users & Groups** - Check **Local Launch Permissions**:
   - Administrators Group
   - Interactive Group
   - IUSR Account
   - IWAM Account
   - Network Group
   - Network Service Group
   - OPWeb_LG Group
   - System Group

Note: *Windows® 2003 and 2008 Server – the **OPWEB_LG** Group must have all four items checked: **Local Launch**, **Remote Launch**, **Local Activation**and **Remote Activation**.*

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8. Set the same permissions as above for the **Access Permissions** section for both Windows® 2003 & 2008.
9. If you had the OPAuto Document entry, Follow steps 5 – 8.

Windows® 2003 Additional Settings

Set the MIME Type

1. Start Internet Information Services (IIS).

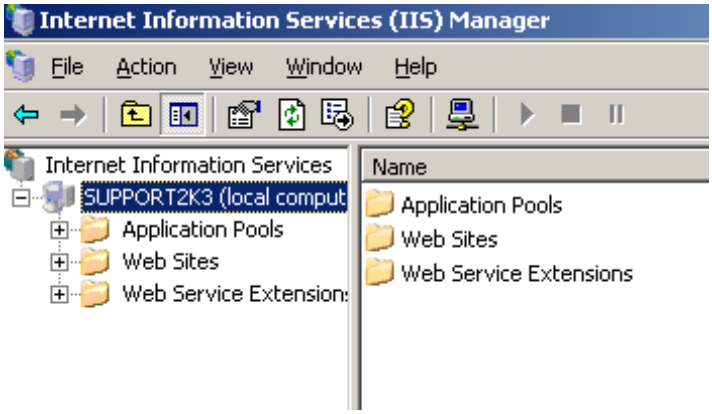

Figure 13

2. Select the Computer**,** right-click and then select **Properties**.

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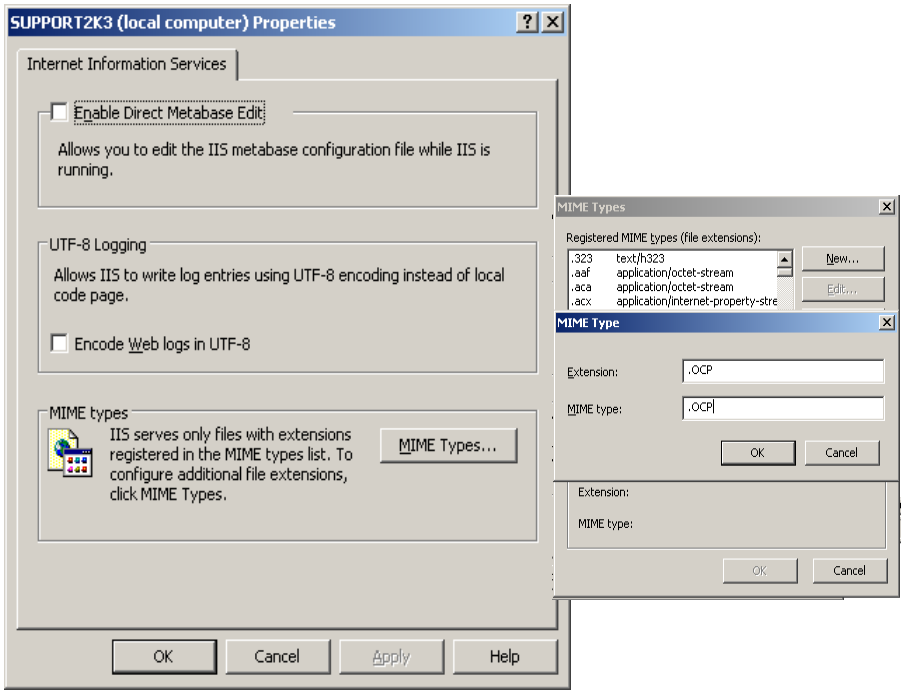

Figure 14

3. Click **MIME Types**
4. Click **New,** and then **Enter**.
5. Use **.OCP** for both **Extension** and **MIME Type**.
6. Click **OK**.

Enable ISAPI DLLs

1. Start Internet Information Services.
2. Expand **Local Computer** and select **Web Services Extensions**.
3. Right-click **All Unknown ISAPI Extensions** and select **Allow**.
4. Click **Yes** on the warning message.

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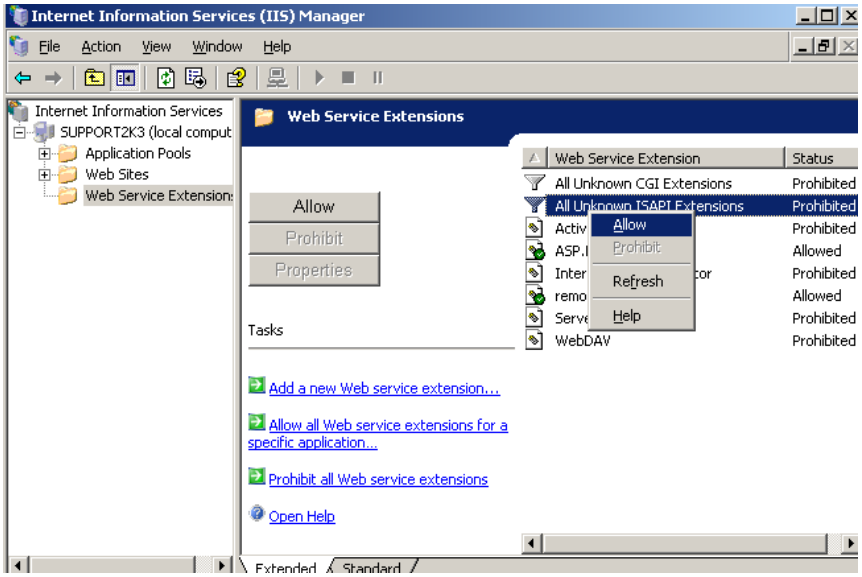

Figure 15

If you do not wish to enable **All Unknown ISAPI Extensions** then you must select **Add a new Web service extension,** and add an extension for each published chart DLL file (a file with the name of the published chart file that has an extension of **.dll**) that you plan to use on the Web server.

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OrgPublisher 9 Thin Client Implementation Guide

VERSION 9

aquire OrgPublisher

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Introduction

The purpose of this document is to cover the topics specifically pertaining to OrgPublisher EChart Thin Client. Important considerations are discussed and configuration changes are covered.

For EChart server implementation and Web server setup refer to the separate document, *OrgPublisher_9_EChart_Server_Setup.pdf* located on http://www.aquire.com/support/

Unlike OrgPublisher EChart Rich Client, Thin Client does not require an ActiveX control. Not requiring an ActiveX control makes deploying the Thin Client published chart easier from a rollout perspective. However, not using an ActiveX control means that the Web server that serves the Thin Client chart is doing more work. Thus, Thin Client often requires more server resources.

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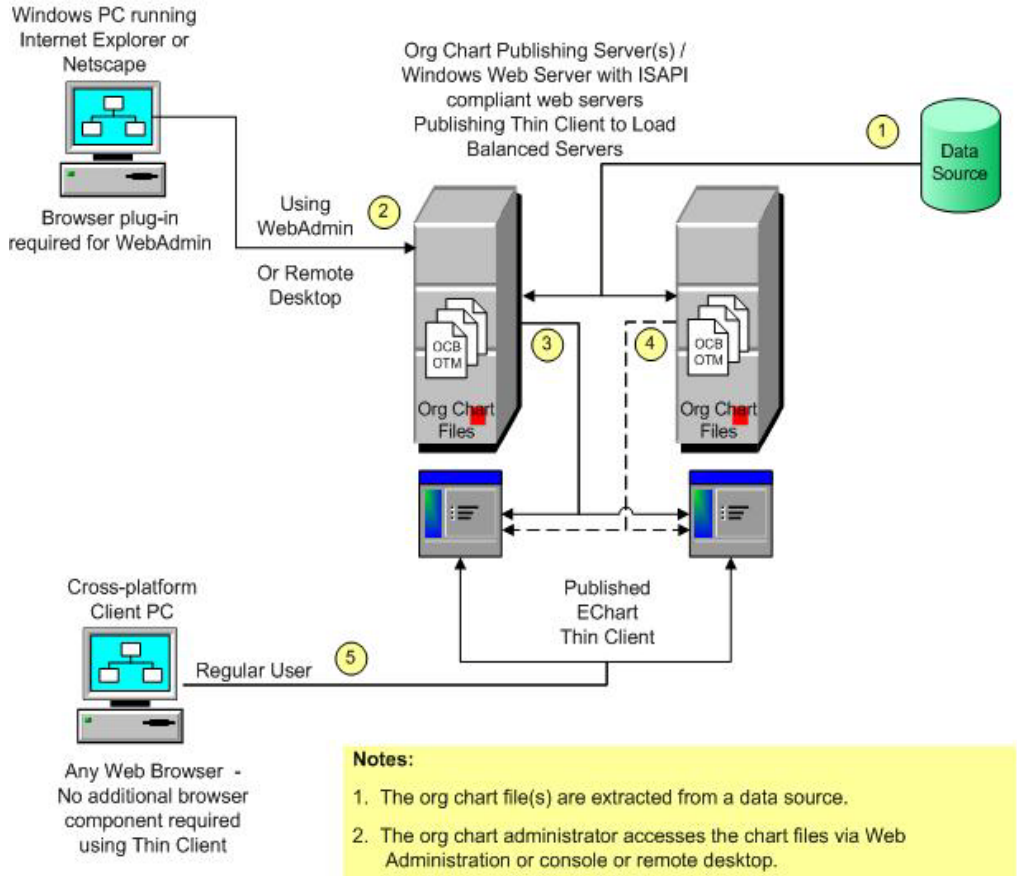
OrgPublisher Thin Client Architecture

Figure 1 shows the recommended architecture for Thin Client. Dual load balanced Web servers are shown. In this configuration, the OrgPublisher Web Administration Server is used to access the source charts on a Web server. The data source can be either a database or a text file.


Windows PC running Internet Explorer or Netscape
Browser plug-in required for WebAdmin
Org Chart Publishing Server(s) / Windows Web Server with ISAPI compliant web servers Publishing Thin Client to Load Balanced Servers
Using WebAdmin
Or Remote Desktop
1
Data Source
2
OCB OTM
Org Chart Files
3
4
Published EChart Thin Client
Cross-platform Client PC
Regular User
5
Any Web Browser - No additional browser component required using Thin Client

Notes:

1. The org chart file(s) are extracted from a data source.
2. The org chart administrator accesses the chart files via Web Administration or console or remote desktop.
3. One Web server is scheduled to publish nightly to both Web servers. Scheduling is done via Scheduled Tasks running a batch file.
4. The other Web server has an identical configuration, except that its scheduled tasks are disabled and would only be enabled if the first Web server were offline for an extended period of time (overnight for example)
5. Thin Client files which are available to regular users, cross platform using any Web browser, requiring no additional Web browser component.

Figure 1.

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EChart Thin Client Server Requirements

EChart Thin Client utilizes the server rather than individual user workstations to process the org chart. The EChart Thin Client server hardware requirements can vary depending on a number of factors, such as number of records charted, number of custom fields, concurrent users, whether the servers are dedicated to only this function or not, and so on. Therefore, it really depends on the parameters of the specific environment. Ultimately, load testing in the working environment will determine the final configuration.

The following matrix contains recommendations that can serve as a starting point for estimating hardware requirements for Thin Client.

EChart Thin Client Number of Records	Dual Load Balanced Servers Processor	GHz	Memory	Dedicated vs Shared Server Memory
Up to 1,000	P4	2	512MB	1GB
1,001 to 5,000	P4	2.5 – 3	1GB	1.5GB
5,001 to 15,000	P4	3	1GB	1.5GB
15,001 to 25,000	Dual P4	3	2GB	2GB
25,000 and up	Dual P4 Hyper Threaded	3	2GB	2GB

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EChart Thin Client Org Chart Authentication

Org chart authentication is accomplished via the EChart Thin Client publishing option. EChart publishing offers security options at the chart and field level. Field level security is covered in a later section.

Chart security options control authentication methods. The options are:

- Unsecured – All users can view the entire chart.
- Microsoft® Active Directory authentication
    - When a user accesses the chart a prompt appears asking for the user ID and password of the logged in user.
    - The credentials are entered and the operating system is queried to determine the domain user ID of the user of that computer.
    - The formats for the **User ID** field are:
        - **User ID only**
        - **Domain/User ID**
        - **Domain.company.com/User ID**
    - The user is then placed in the chart at the starting point defined by the publishing definition.
    - This option requires that there be a custom field containing the Windows® Domain user ID in the input data file.
- **System user ID/Box Linkage**
    - The server grants access to the chart to any user ID on the user machine. ***This is not a secure setting.*** The chart opens at the user's box. This option requires that there be a custom field containing the user ID of the computer.
    - This option is not secure because it uses whatever ID is logged on to the computer. It can be a local computer account, which could be created by anyone with appropriate access to the computer.
- **Chart authentication**
    - The server prompts each user for a user ID and password in order to open the OrgPublisher EChart. The user IDs and passwords are contained or present in the input file record and selected in the *Publishing Wizard* when activating this security type.
    - This method requires a custom field containing the value of the user ID, and another custom field containing a password value. This

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password can be randomly generated and fed into the chart data by an external program.

- **Reverse Proxy**
  - The user ID is supplied in an HTTP header. When a user accesses the chart URL, a reverse proxy Web server intercepts the request and, through an authentication program/method, supplies the appropriate user ID as a variable in the HTTP header and sends it to the original destination.
  - The EChart uses this variable value provided in the header to perform a lookup in a specified custom field containing the user IDs.
  - An alternate option allows the variable to be passed as a cookie.

In addition to chart security options, ECharts also control the starting point in the org chart. Options are:

- Top of chart
- Supervisors Box
- User's Box
- A box ID specified by a particular custom field

Finally, the **Allow users to drill up from starting box** check box allows users to navigate to levels above their box in the chart.

Clear the check box if you *do not* want users to navigate above their own chart level.

EChart - Field Level Security – Also known as Role Based Security

EChart security also provides Field level security. Field level security allows, or disallows, users to view information based on whether or not they are a member of a particular group.

For example, if you have a chart with salary information, you may want only members of the "HR" group to be able to see the salaries. In OrgPublisher, you define a group called HR, which is based on criteria which queries the chart data and defines who should be a member of HR. When you authenticate to and view a chart, if you are a member of the HR group, you are able to see the Salary field.

Note: *Style Level security, which controls whether or not you can see certain styles, is not available in Thin Client.*

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Configuring Automatic Microsoft Active Directory Authentication

EChart Thin Client Security allows you to control authentication into the chart as well as field level security. With Thin Client security, by default, you must login manually to access the chart, even when using Microsoft® Active Directory authentication.

However, with OrgPublisher V7 and later, if you don't want this prompt, you can:

1. Verify the Web server is running IIS – this does not work with Apache™.
2. Turn off **Anonymous access** to the Web folder so the Web server knows the identity of the clients.
3. Verify that **Integrated Windows Authentication** is checked.
4. Set **IIS Application Protection** to low.

Thin Client Security Tokens

Once you have logged in to a secure chart, a security token is generated. This token remains aware of who is logged in. It monitors chart activity and if there is no activity for 10 minutes, the token times out, causing the user to re-authenticate to the chart. The default inactivity time-out of 10 minutes can be changed through a registry entry.

To modify the default inactivity time-out, you must edit the client computer's registry. Create a **DWORD** value called **LoginExpires** in the following key.

HKEY_LOCAL_MACHINE\Software\Aquire\OrgPublisher9\ThinServer

The value is a decimal number specifying the number of minutes before timing out.

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Thin Client Printing

Thin Client printing is accomplished via a PDF file which can be printed. This option publishes to a PDF document for easy emailing and printing. It does require the free Adobe® Acrobat® Reader® Version 9, to view the output.

The PDF publishing option publishes in Book Style only. Use the *Print Preview* window in OrgPublisher to control the Book Style output of the PDF file. In the *Print Preview* window, click **Settings**. In the *Settings* dialog, you can control the appearance of the printout, including enabling or disabling the **Print Index**, **Group Icon Legend**, **Page Number Circles**, **Zoom each page**, **Header and Footer**, etc.

A PDF "printer" must exist during PDF publishing. If a "PDF printer" does not exist, one is created temporarily prior to publishing, and then deleted after publishing is complete. This extra process takes extra time.

If the "PDF printer" exists, then publishing PDF occurs at normal speed.

This PDF printer can be permanently created using the program **PDFDRV.EXE**, which is installed during the installation of OrgPublisher.

Publishing in PDF Format:

- In order to print from Thin Client, the PDF printer must exist. Choosing the OrgPublisher Custom Installation (Web Administration Server) portion of the installation program creates this printer by default.
- If you are publishing to an IIS server that does not have OrgPublisher installed and you want to print Thin Client, you must copy **PDFDRV.EXE** to the Web server and execute it so that the Web server can print from Thin Client.
- By default, printing is limited to 500 records. Attempting to print more than 500 records generates a new HTML page with an error message.

  The default number of records that can be printed can be changed through a registry entry. The maximum number of records that can be printed is approximately 2000 records. If you set this number higher than 2000, you may get an error when trying to print. This limitation is due to the PDF driver.

  To modify the default print limit you must edit the client registry. Create a **DWORD** value called **PrintLimit** in the following key.
  HKEY_LOCAL_MACHINE\Software\Aquire\OrgPublisher9\ThinServer
  The value is a decimal number equal to the number of records you wish to allow to be printed.

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- If you click the print button and nothing happens, make sure that you have **Read and execute permissions** assigned to the folder where the **pdfui250.dll** file is located.

Troubleshooting EChart Thin Client - Log Files

ECharts log activity when published and accessed using EChart security.

The log file is found in the published charts folder and is the same name as the file that is published. When the Web service is restarted, the next access to the EChart creates a new log file.

The previous log file is renamed to preserve past information. This can occur up to 9 times. After that, each log file is cycled through the 9 backup files and the 10th file is then lost.

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Searching Thin Client Charts

The default search field in Thin Client charts is **Last Name.** This default can be changed with a registry setting on the server. To modify the default search field, create a **DWORD** value called **DefaultSearchIndex** in the following key.

HKEY_LOCAL_MACHINE\Software\Aquire\OrgPublisher9\ThinServer

The value is a decimal number equal to the appropriate field.

The values to use are:

AllFields = **1001**

AllStandardFields = **1002**

AllCustomFields = **1003**

PosTypeField = **1004**

StatusField = **1005**

RelationshipField = **1006**

GroupField = **1007**

PersonIdField = **1009**

To make the default search field a custom field, the value for the registry key must correlate to the field value (any fields greater than field 19 equal 1000+ the field number. For example, if the custom field sequence number you want is 22, the registry key is 1022.).

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Customizing EChart Thin Client

OrgPublisher Thin Client charts are dynamic HTML versions of org charts. You can customize the HTML pages to more closely match the look and feel of your Web site, as well as what information is displayed, by linking to your custom style sheet.

Publishing Options

In the publishing definition you have several options:

- JavaScript must be enabled if you want to give end users the ability to close views or search on numeric fields.
- You can enable or disable end users' ability to print charts as PDF.
- There are two options for chart graphics; JPEG and GIF.
  - JPEG provides high text quality and very high photo, gradient, and background image quality.
  - GIF provides very high text quality but lower photo, gradient, and background image quality.
- You can use optimize toolbar and button images by caching static images. If enabled, the **ChartImages** folder (from the **OrgPub9** folder where you installed it) must be copied to the destination Web folder.
- Because there is no input type for tree control in HTML, the *Tree View* is not available in Thin Client charts.
- The search feature is not available in its entirety in Thin Client charts. End users can access a modified *Search View* by clicking the *List View* button in the toolbar.

  Note: *For additional help with publishing Thin Client Charts, see the following Online Help topics:*

  - *Publish EChart Thin Client*
  - *Publishing in EChart Thin Client Format*
  - *Choosing EChart Thin Client Settings*
  - *Troubleshooting tips for Published ECharts*

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Modifying the Look and Feel of the Published Chart

Thin Client technology uses a cascading style sheet called **windows.css** to control the look and feel of the thin chart. HTML programming is accomplished via a file called **thinserver.dat**. **Thinserver.dat** is located in the installation folder of OrgPublisher. The cascading style sheet is located in **C:\Program Files\OrgPub9\css**. You can also customize your own cascading style sheet and specify its location in the Thin Client publishing definition.

Below are examples of customizations. There are other examples of modifying these files, which can be found in the SDK at the following Web page location.

http://www.aquire.com/downloads/Automation.html

Note: *Support for these types of modifications fall outside the realm of normal Product Support, and are handled by our Professional Services Group on a consulting basis.*

Example 1

Here is an example of how to change the thin client login window gray background to white. Change the BACKGROUND-COLOR parameter value from #E9E9D8 to #FFFFFF: (see highlighted example below)

```
<STYLE TYPE="text/css" MEDIA=screen>
<!--
BODY
{
   MARGIN: 0px;
   MARGIN-LEFT: 0px;
   MARGIN-RIGHT: 0px;
   FONT: 10px Arial, Helvetica, sans-serif;
   COLOR: #000000;
   BACKGROUND-COLOR: #FFFFFF;
}
```

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Example 2

Here is an example of how to hide the group names from the Style bar. Remove the line of text below from the **thinserver.dat** file.

```
<td class="groupoff" nowrap valign="middle"><a href="JavaScript:toggleGroups();"
id="groupname" class="groupoff">  %GROUP_BUTTON_LABEL%
%CURRENT_GROUP_NAME%  </a></td>
```

To test any changes to **thinserver.dat**, you must:

1. Edit and save the **thinserver.dat** file.
2. Close and reopen OrgPublisher.
3. Publish your file and test.
4. Repeat steps 1-3 as needed.

Thin Client URL Parameters

The following parameters can be added to the URL to control a Thin Client chart.

OrgPublisher Thin Client charts are dynamic HTML versions of org charts. You can customize the HTML pages to more closely match the look and feel of your Web site, as well as what information is displayed, by linking to your custom style sheet.

Authentication – It is possible, although not secure, to pass a user name and password in the URL in order to authenticate to a chart that has been published using chart authentication.

USERNAME = the user name with which to authenticate

PASSWORD = the password for the user name

Example:

http://computername/ECharts/Orgchart.dll?Frame&USERNAME=lfranklin&PASSWORD=password

Another possibility is to specify the same field as both the username and the password fields. That way you only have to control one field. This method is a convenient way to jump into a Thin Client chart programmatically from a lookup page, or, possibly, from another chart. This publishing definition parameter page is shown below.

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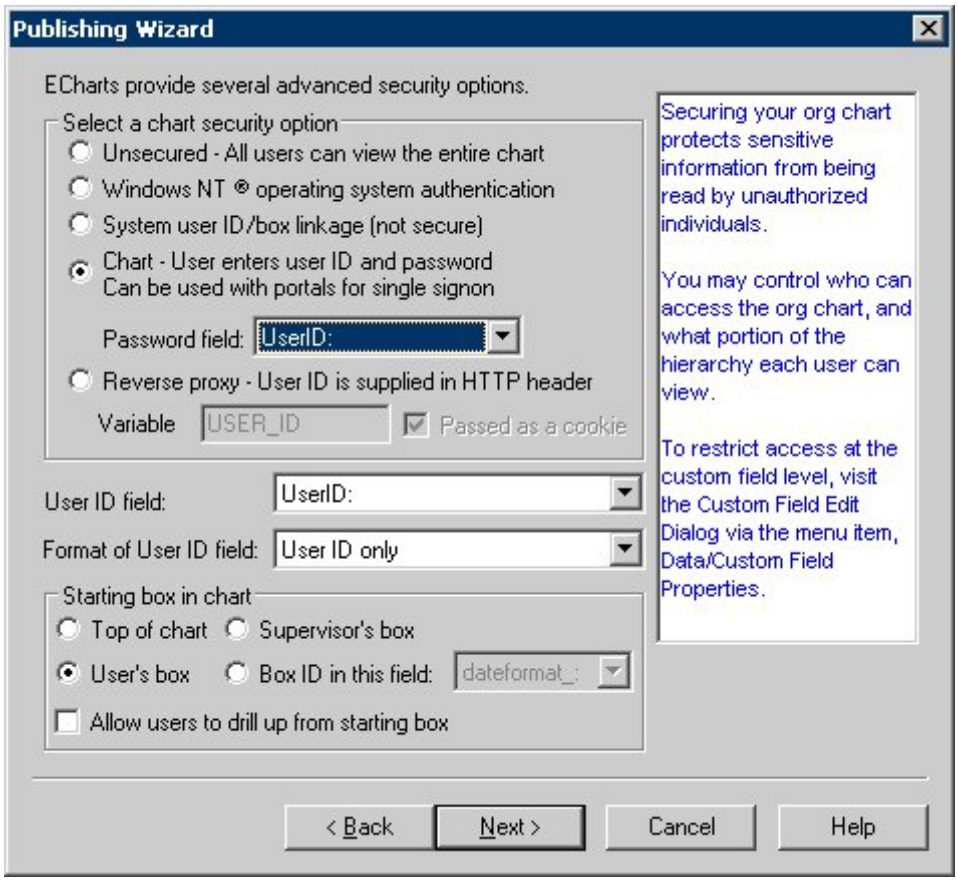
Publishing Wizard
ECharts provide several advanced security options.
Select a chart security option
Unsecured - All users can view the entire chart
Windows NT ® operating system authentication
System user ID/box linkage (not secure)
Chart - User enters user ID and password
Can be used with portals for single signon
Password field:
UserID:
Reverse proxy - User ID is supplied in HTTP header
Variable
USER_ID
Passed as a cookie
User ID field:
UserID:
Format of User ID field:
User ID only
Starting box in chart
Top of chart
Supervisor's box
User's box
Box ID in this field:
dateformat_:
Allow users to drill up from starting box
Securing your org chart protects sensitive information from being read by unauthorized individuals.
You may control who can access the org chart, and what portion of the hierarchy each user can view.
To restrict access at the custom field level, visit the Custom Field Edit Dialog via the menu item, Data/Custom Field Properties.
< Back
Next >
Cancel
Help

Figure 2.

Here is a sample URL for using this method.

http://computername/ECharts/Orgchart.dll?Frame&USERNAME=lfranklin&PASSWORD=lfranklin

Other parameters include:

STYLE = Style selected. Number **0** = the default style (the one it was published with). Styles are numbered **1** to however many there are, as they appear in the style's list.

Example:
http://computername/ECharts/Management_Thin.dll?Frame&STYLE=1

DRILL = Turns drill buttons on or off. **1** = on, **0** = off, **2** = default

Example:
http://computername/ECharts/Management_Thin.dll?Frame&DRILL=0

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BOX_SELECTED = selects the specified box id. If it doesn't exist the top of the chart is displayed.

Example:
http://computername/ECharts/Management_Thin.dll?Frame&BOX_SELECTED=5

LEVELS = Sets the number of levels to be displayed. Number **2** or greater. **0** = default.

Example:
http://computername/ECharts/Management_Thin.dll?Frame&LEVELS=2

TOP = box id

Determines the top box of the chart – useful for unsecured charts.

Example:
http://computername/ECharts/Management_Thin.dll?Frame&TOP=3

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EChart Rich Client / Thin Client Comparison

The Thin Client option is a form of EChart however there are some differences between the Rich Client mode and Thin Client mode in a published chart. The table below outlines these differences.

Feature	Rich Client	Thin Client
Chart Design templates	Yes	Yes
Chart legend	Yes	Yes
Hover Profile	Yes	Yes
Spotlight groups and search results	Yes	Yes
Real-time publishing	Yes	Yes
Multiple viewing levels	Yes	Yes
Displayable views	Yes	No *Tree View*; *Search View* does not have a separate *List View* as in PluginX
Resizable views	Yes	No
Show/hide views	Yes	Yes
Moveable (docking) views	Yes	No
Printable views (other than *Chart View*)	Yes	No
Drill-up/Drill-down navigation	Yes	Yes
Hotspot links	Yes	Yes
Smart Links	Yes	Yes
Chart searches (toolbar, *Search View*, *Search* dialog)	Yes	Toolbar button opens *Search View*
Ad hoc or **My groups** tab in *Search View*	Yes	No
Group Editor dialog	Yes	No
Saved ad hoc/**My groups** queries	Yes	No
Email a group	Yes	No
Quick search from toolbar	Yes	Only the records actually seen
Status bar	Yes	Yes
Zoom factor, zoom to point	Yes	No

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Feature	Rich Client	Thin Client
Copy option	Yes	Browser image copy
Copy query results to clipboard	Yes	Only the records actually seen in the window
Photos in chart	Yes	Yes
Selectable chart styles	Yes	Yes
Logo/watermark support	Yes	No
Print preview	Yes	In PDF viewer only
Print as a book	Yes	PDF document
Print as wall chart	Yes	Browser print
Security validation (Microsoft Active Directory authentication, ID/Box linkage)	Yes	Yes
Automatic/single sign-on security	Yes	Yes, using Windows Microsoft Active Directory ® authentication when running IIS with anonymous access disabled
Browser component required (PluginX)	Yes	No
Section 508 accessibility	Yes	No
Access to a UNC path for photo linkage	Yes	No
Support provided for the Apache httpd server	Yes	No
Viewable by Mac® computer and UNIX® operating system users	No	Yes, with JavaScript turned off
Support provided for the Apache httpd server	Yes	No

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OrgPublisher 9 Upgrade Considerations

VERSION 9

aquire OrgPublisher

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Upgrading from OrgPublisher Versions 3 through 8

The following information is provided to assist in planning the upgrade activity for OrgPublisher 9 if you are currently using older versions of OrgPublisher.

If you...	In Version 9 you need to...	Because...
are using OrgPublisher version 5, 6, 7 or 8 without Web Based Administration:	use **Add/Remove Programs** to uninstall the OrgPublisher application.	it removes the earlier versions.
using Web Based Administration:	1. Stop the Web service. 2. Uninstall older version using **Add/Remove Programs** 3. Delete the **remoteserver.dll** file. 4. Install OP9. 5. Start the Web service.	the new version of the **remoteserver.dll** file needs to be installed.
are currently publishing ECharts with an older version of OrgPublisher	1. Stop the Web service. 2. Delete the **dll** file(s) for your EChart(s) both Rich and Thin client. (These are files located in your Published Charts folder and they are named for each EChart you published.) 3. Start the Web service.	the **dll** file will not overwritten if it is in use.

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If you…	In Version 9 you need to…	Because…
published as OrgPublisher PluginX and customized the HTML page for any reason. **OR** deployed the PluginX component (cabinet file) from your company server. **OR** if you have users who are not administrators on their own PCs and cannot install plugins, you can request scripts to "push out" the plugins to locked down PCs from the Aquire support team at support@aquire.com.	copy and paste the following URL to your browser to download the v9 cabinet file from our Website: http://www.aquire.com/downloads/plugins/ and select the option to download the OrgPublisher 9 Cabinet file. edit the **.js** file with Notepad (.**htm** files contained codebase statement in versions previous to V7R). modify the codebase statement to reflect your path: **codebase=http://www.aquire.com/codebase91/orgpubX.cab#Version=9,1,2602,1**	the cabinet file must be updated to utilize OrgPublisher 9 features. **Tip:** A feature in the Publishing Wizard allows you to create an OrgPublisher PluginX definition that will not overwrite the **.js** file each time you publish. This will preserve any changes made to your file.
have scheduled publishing.	delete and recreate the scheduled jobs either using Microsoft task scheduler (for EChart batch files) or in the publishing definition in OrgPublisher. Alternatively, you can modify the .BAT file or the scheduled task job to point to the correct OrgPublisher install folder's orgpub32.exe.	it updates the scheduled job to open the new version path.
would like to use the new features in publishing definitions.	update any existing publishing definitions with new tool bar options. (This may be a function of Chart Administrator)	the toolbar selections can now be turned on at the button level in based on groups V9.

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If you…	In Version 9 you need to…	Because…
used a default template.	1. start OrgPublisher 9. Select **File** > **Set template as default**. 2. locate the OP4, OP5, OP6, OP7 or OP8 file default.otm. (By default, OrgPublisher is installed in Program Files/OrgPub**X**, (**X** is your old version number.) 3. copy the default.otm file from that folder into the V9 folder.	OrgPublisher 9 is (by default) installed in a separate directory; copying default.otm will preserve your chart formatting information.
would like to use the **Multiple Reports** feature. Would like to use the **Compare two charts** feature You may have done this during previous upgrades or you may not be using these features.	Make sure field 5 of the input file, the ID field, is a unique identifier for the employee. Make sure you designate a data field with a unique ID as “Position ID” (if using ODBC mapping) or Field 17 if using a .csv file.	this field is used to tie all records for an employee together. If you have person-to- person reporting you can use field 5 to compare charts, but if you want to track movement of positions, use PositionID
created My groups in a published PluginX/EChart. You may have done this during previous upgrades or you may not be using these features.	1. Before publishing the new charts, instruct your users to export their “My groups” groups using the Export Groups function. 2. Republish your charts. 3. Instruct your users to import the groups using the Import Groups function.	the My groups definitions are stored in a different registry key.
are upgrading from V3 are upgrading from V4 through V8	Continue to next section. You are done.	

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Upgrading from Version 3.3a

The following information is provided to assist in planning the upgrade activity with the installation of OrgPublisher 8.1 if you are currently using OrgPublisher 3.3a.

If you…	In Version 8.1, you need to…	Because…
customized the *Search Dialog* box using registry settings.	1. Select **Options**, then **Search Options**. 2. Select **Customize Search dialog** and make the changes needed.	v3.x used Registry settings to control the *Search dialog* box. V8 stores this information in the template (.**otm**).
used OrgPublisher AutoPub to automatically publish charts.	1. remove OrgPublisher AutoPub: a. select **Start** > **Settings**> **Control Panel** > **Add/Remove Programs**. b. select **TimeVision OrgPublisher AutoPub**. c. click **Add/Remove**. 2. delete previously scheduled jobs in Task Scheduler: a. select **Start** > **Settings** > **Control Panel** > **Scheduled Tasks**. b. delete the scheduled tasks. 3. create new publishing definitions: a. click **Publish**. b. click **New**. c. follow the prompts in the *Publishing Wizard*. d. select the **Schedules** tab in the *Publish Charts* window. e. select **New**. f. follow the prompts to create the new schedule. g. delete the v3.x publishing definitions.	automatic publishing is now built into OrgPublisher.

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